



INTERNATIONAL  
FOOD INFORMATION  
COUNCIL FOUNDATION

# Consumer Food Values, Trends, Attitudes and Drivers

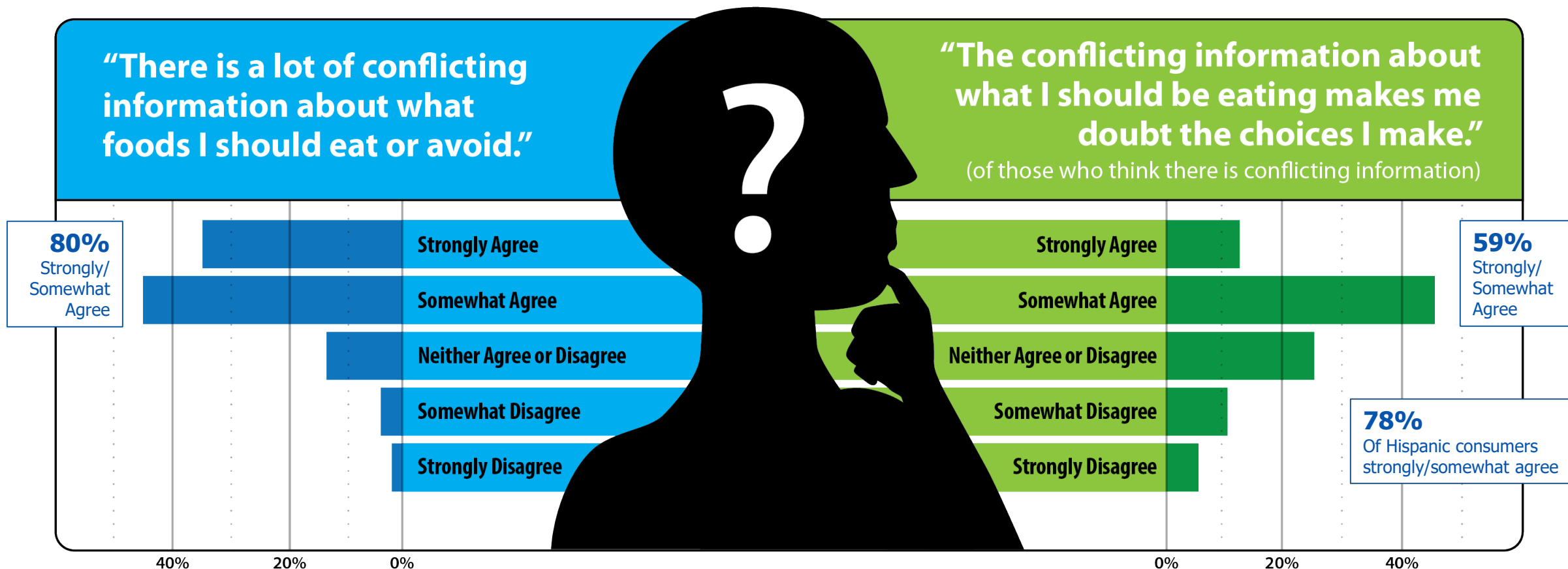
A Presentation to the Ag Outlook Forum

February 22, 2019

Alexandra Lewin-Zwerdling, PhD, MPA

International Food Information Council Foundation

# Conflicting Information Creates “Confusion”



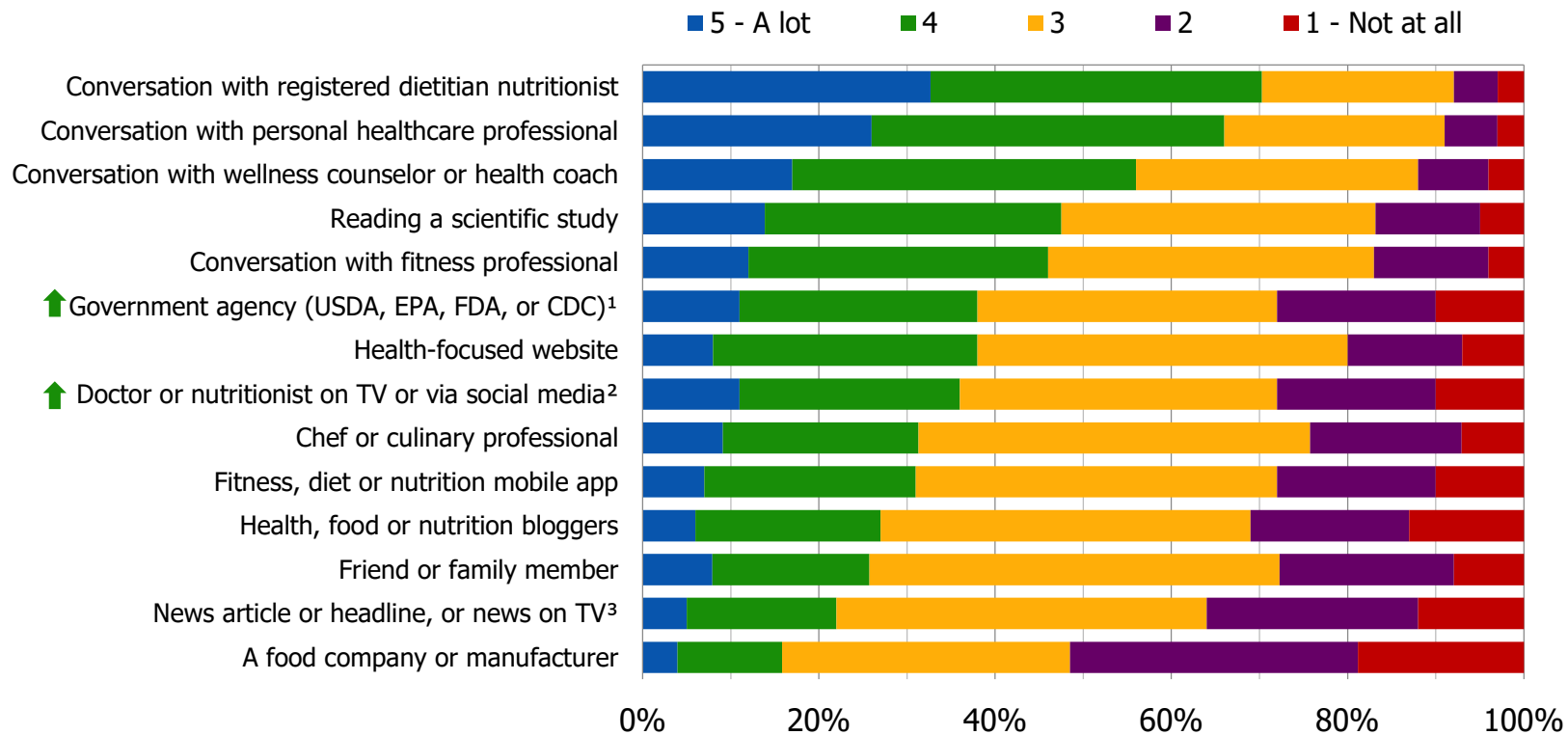
Q8: Do you agree or disagree with the following statement? "There is a lot of conflicting information about what foods I should eat or avoid." (n=1,009)

Q9: Do you agree or disagree with the following statement? "The conflicting information about what I should be eating makes me doubt the choices I make." (Of those who agree about conflicting information, n= 817)

# Consumers Put Trust in Health Professionals

Trust in Government agencies has increased significantly since 2017, going from 25% highly trust to 38%

## Trusted Sources About Which Foods to Eat/Avoid



**76%**

Of older Americans (those 65+) trust a registered dietitian, compared to 65% of younger adults (<35 years old)

Younger adults also have more trust in technology-based sources of information, including fitness apps, bloggers and people on TV

Q10: How much would you trust information from the following on which foods to eat and avoid? (n=1,009)

<sup>1</sup>In 2017, this item did not include the examples in parentheses

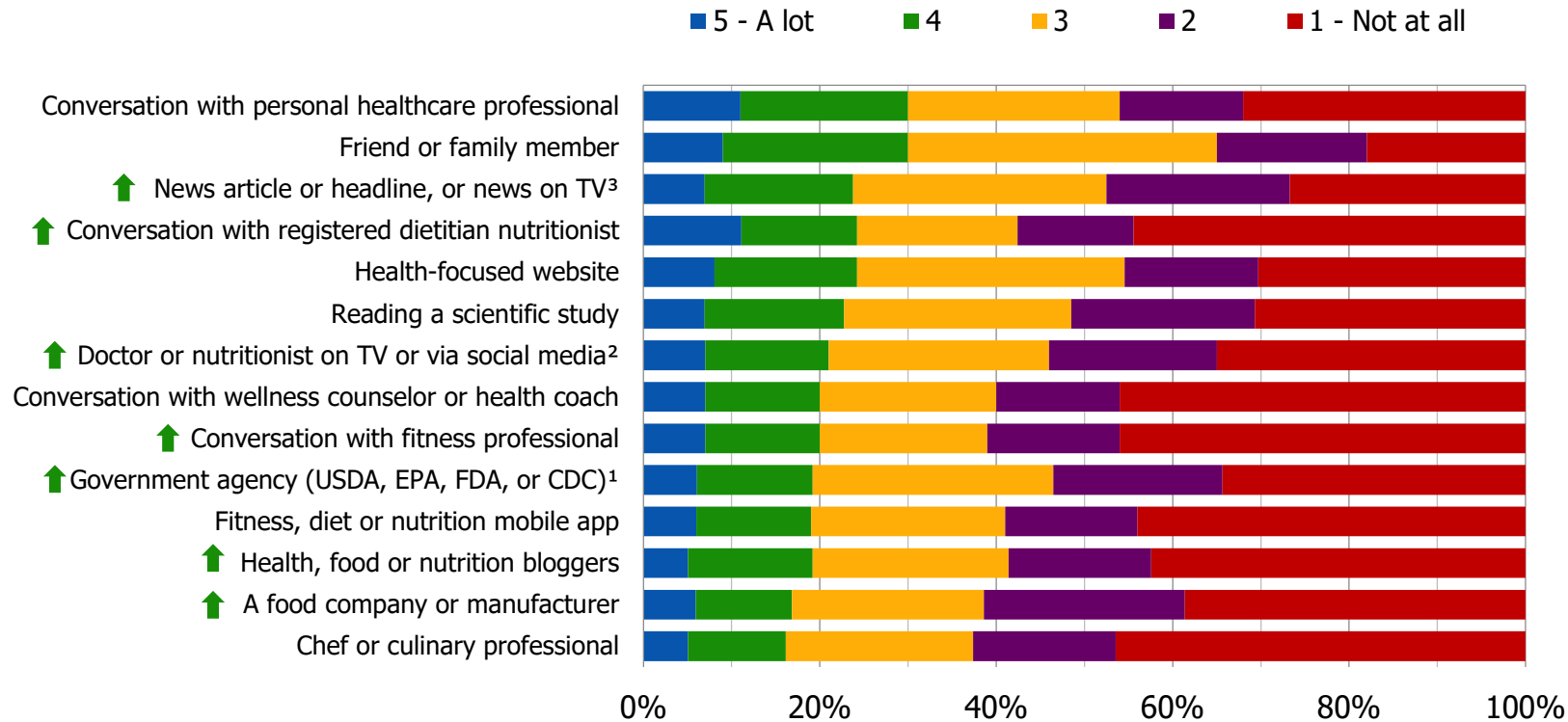
<sup>2</sup>In 2017, this item was phrased as "Healthcare professional on TV or via social media"

<sup>3</sup>In 2017, this item was phrased as "News Article or Headline"

# Consumers Use Multiple Sources for Information

Consumers who rate food sustainability as very important generally indicated using more sources

## Sources for Information About Which Foods to Eat/Avoid



Consumers at a **lower BMI** are more likely to listen to friends, personal healthcare professional and health coaches

Q11: How often do you get information from the following on which foods to eat and avoid? (n=1,009)

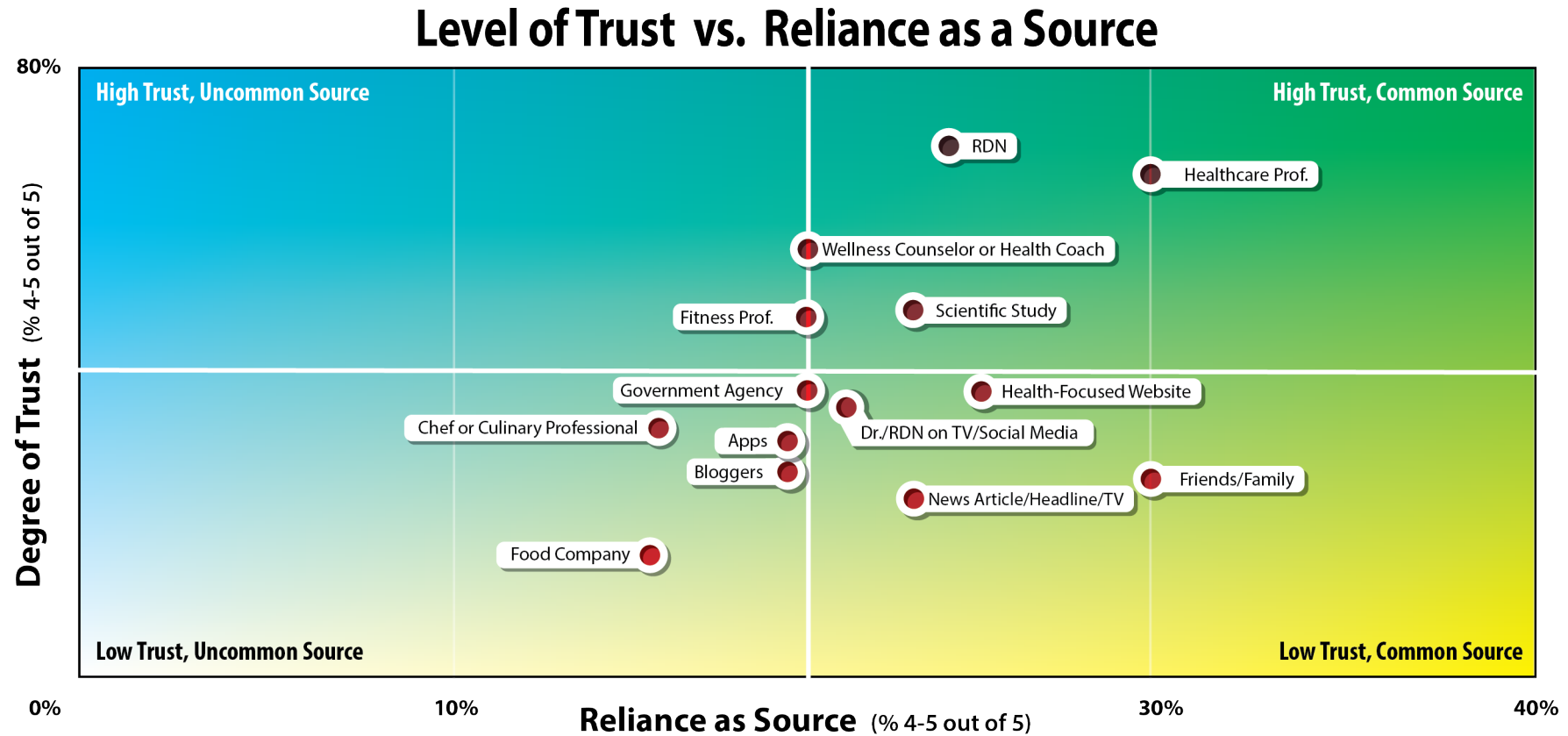
<sup>1</sup>In 2017, this item did not include the examples in parentheses

<sup>2</sup>In 2017, this item was phrased as "Healthcare professional on TV or via social media"

<sup>3</sup>In 2017, this item was phrased as "News Article or Headline"

# Relationship Between Trust and Reliance

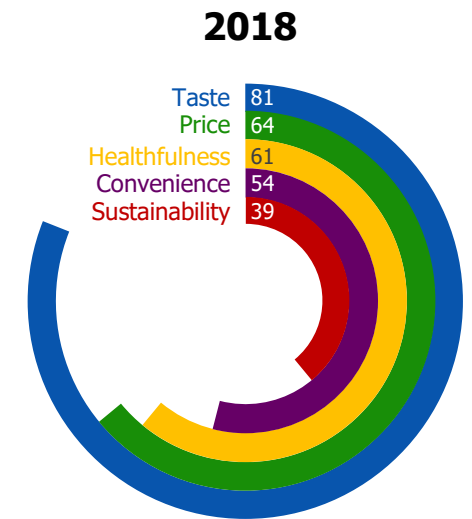
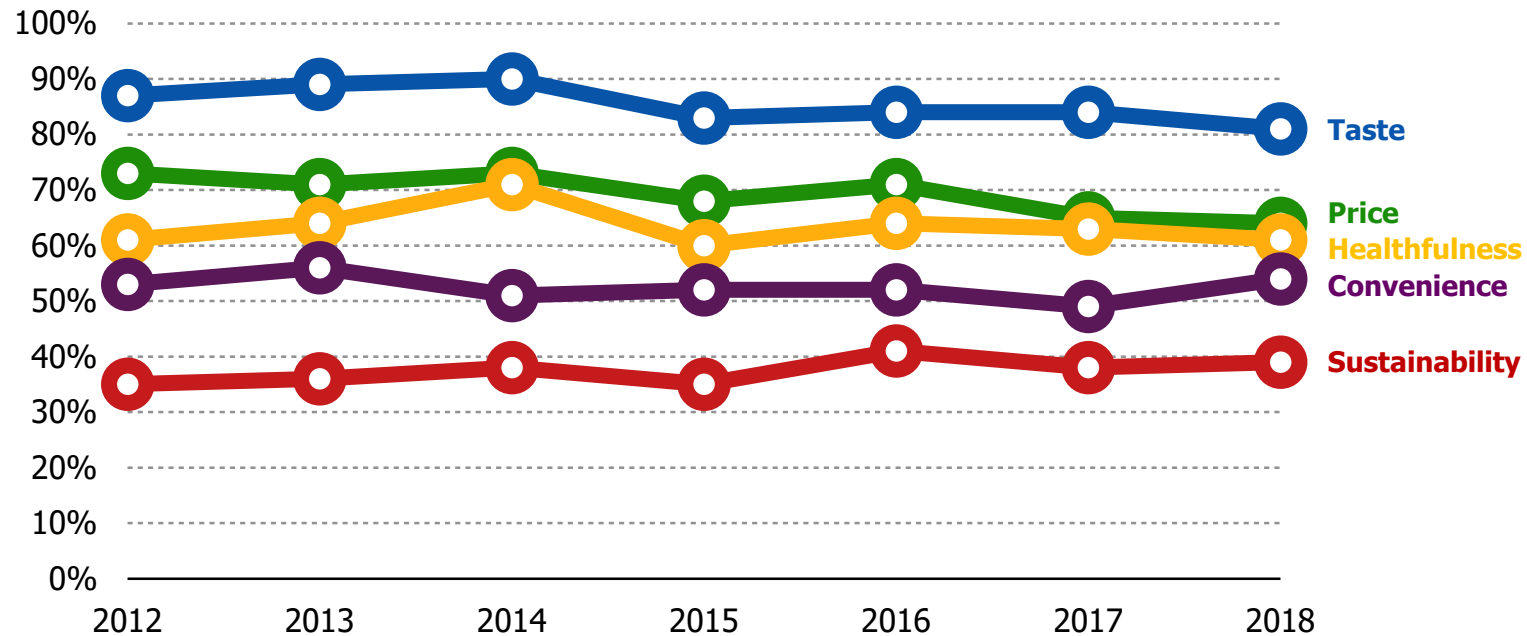
Health professionals trusted and used by consumers to guide health and food decisions



# Taste and Price Remain Top Drivers

Although price is a top driver, it again comes in at a lower level than was seen before 2017

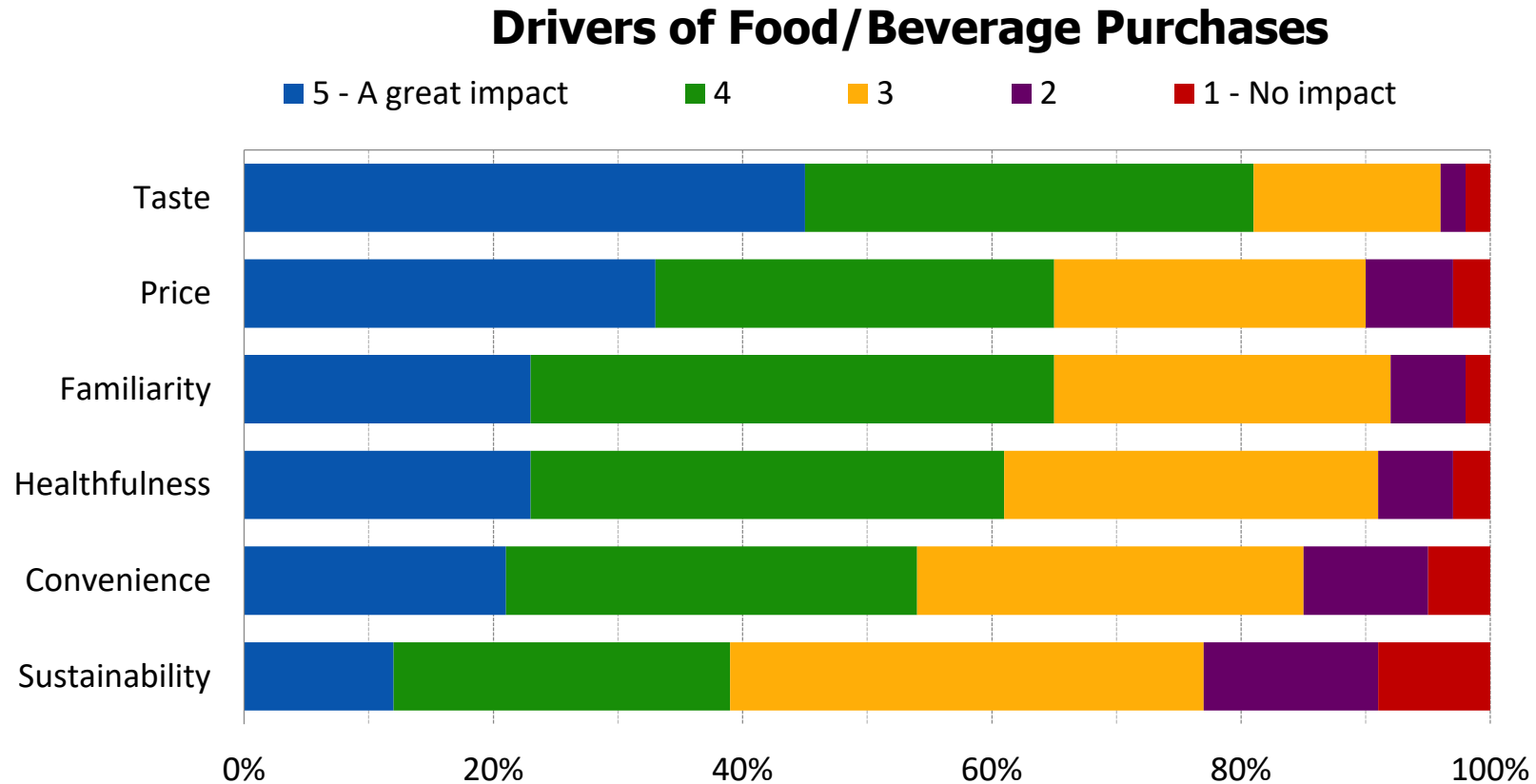
**Purchase Drivers Over Time**  
(% 4-5 Impact out of 5)



Q13: How much of an impact do the following have on your decision to buy foods and beverages? (n=1,009)

# Familiarity is an Important Purchase Driver

Key drivers, like taste, remain unchanged from 2017



**57%**  
Of those under 35 say familiarity is a top driver vs. roughly 7 in 10 older consumers.

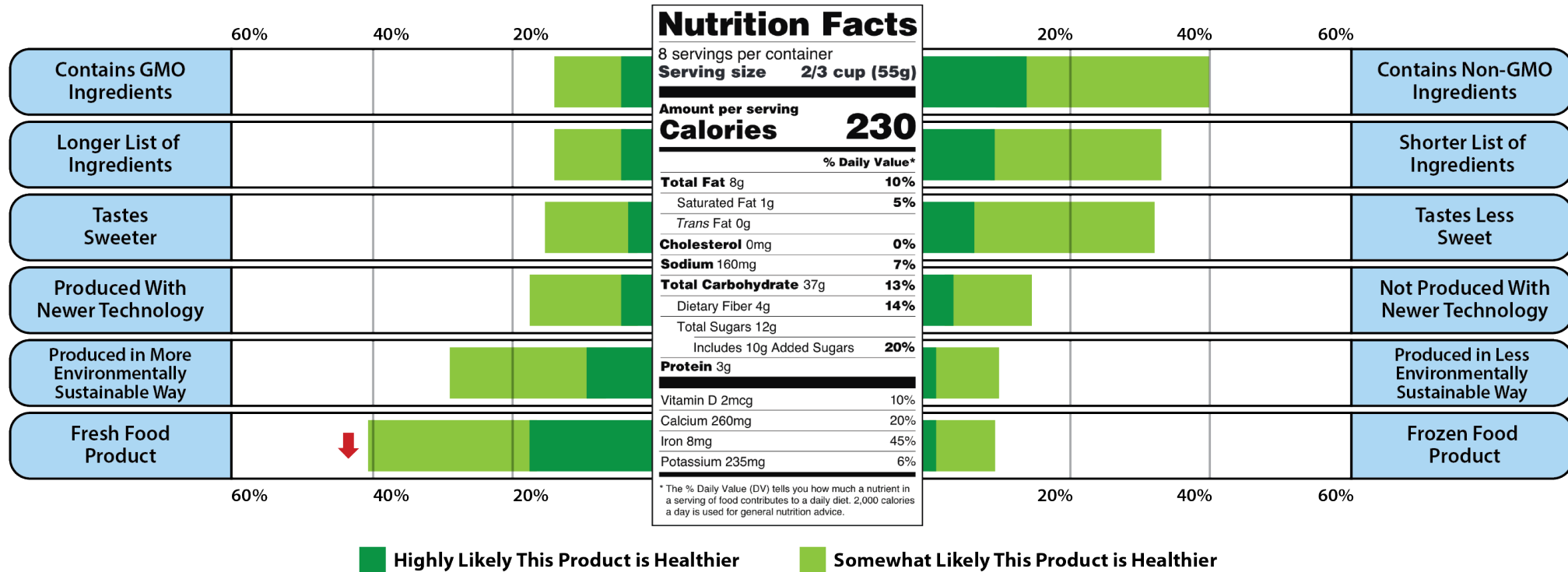
Consumers who report being confused by conflicting nutrition information are more likely to be influenced by several of these factors

Q13/14: How much of an impact do the following have on your decision to buy foods and beverages? (n=1,009)

# How Context Influences the Consumer

Despite identical nutritional info, GMOs, longer ingredients lists, sustainable production and freshness influence perception

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



Nutrition Facts	
8 servings per container	
Serving size	2/3 cup (55g)
<b>Amount per serving</b>	
<b>Calories</b>	<b>230</b>
<b>% Daily Value*</b>	
<b>Total Fat</b> 8g	<b>10%</b>
Saturated Fat 1g	<b>5%</b>
Trans Fat 0g	
<b>Cholesterol</b> 0mg	<b>0%</b>
<b>Sodium</b> 160mg	<b>7%</b>
<b>Total Carbohydrate</b> 37g	<b>13%</b>
Dietary Fiber 4g	<b>14%</b>
Total Sugars 12g	
Includes 10g Added Sugars	<b>20%</b>
<b>Protein</b> 3g	
Vitamin D 2mcg	10%
Calcium 260mg	20%
Iron 8mg	45%
Potassium 235mg	6%

\*The % Daily Value (DV) tells you how much a nutrient in a serving of food contributes to a daily diet. 2,000 calories a day is used for general nutrition advice.

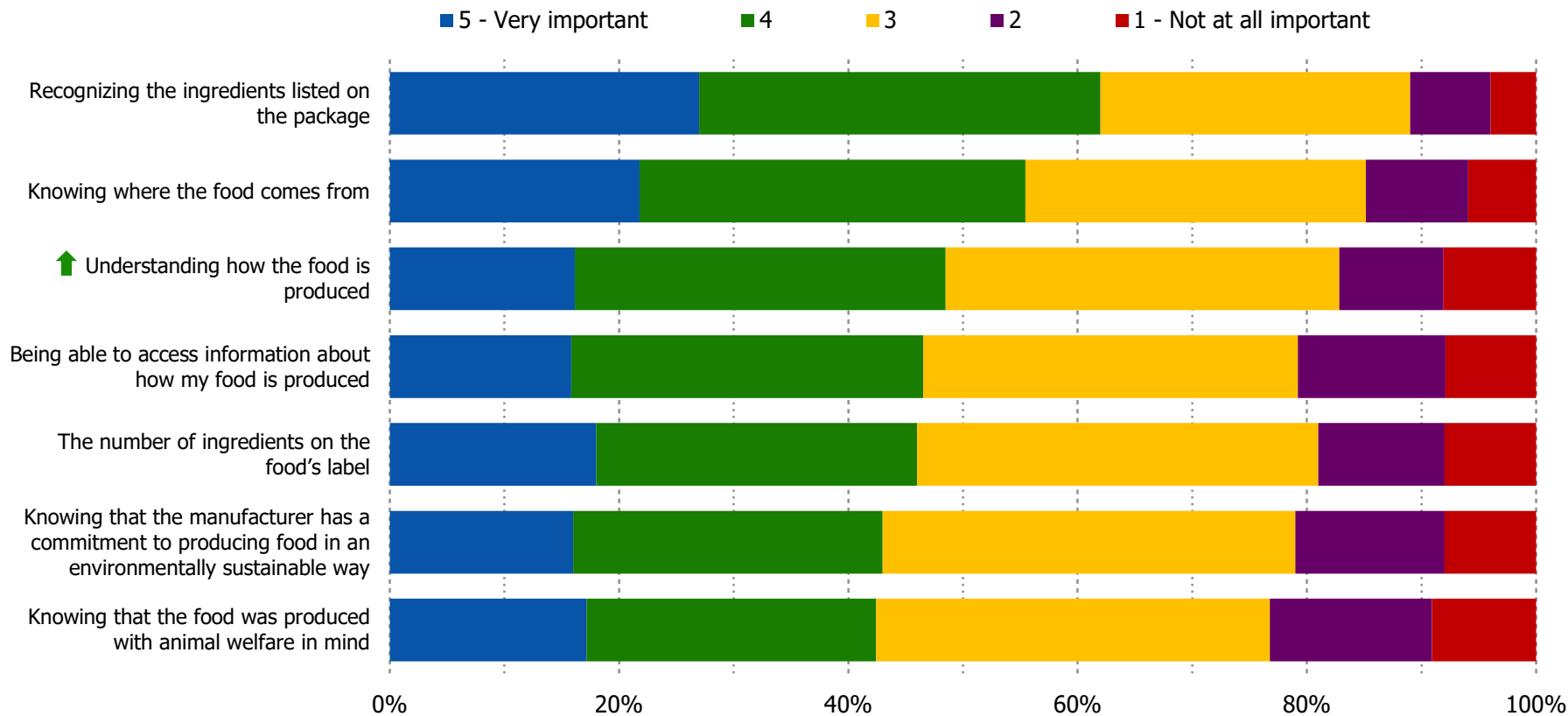
Q18: Imagine you came across two food products that had the exact same Nutrition Facts panel. Would any of the following details lead you to believe that one of the products was more likely to be healthier? (n=1,009)



# Understanding Production Increasingly Impacts Food Purchases

Over half of respondents indicate recognizing the ingredients, understanding where food is from and number of ingredients as key

## Important Factors When Purchasing Food



A higher percentage of **women** rate almost all factors as important, compared to men

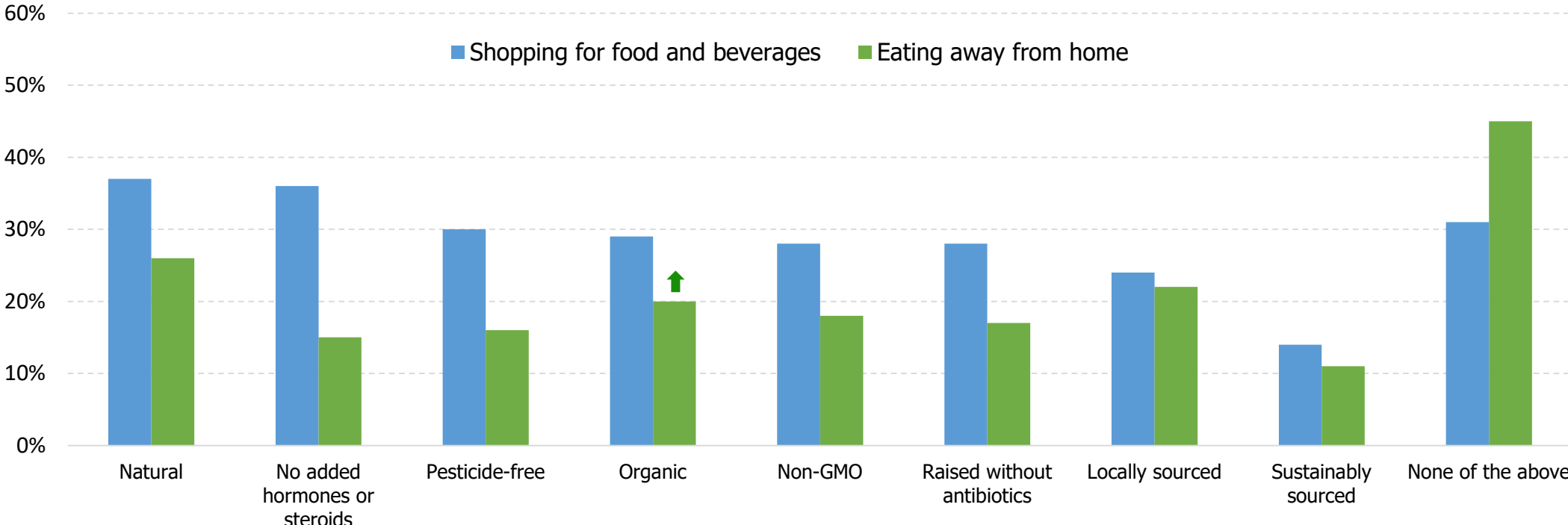
Those who see sustainability as very important rank each factor higher than those that do not

Q43: How important are the following factors in your decision to purchase a food or beverage? (Split Sample A, n=505)

# Natural, No Added Hormones Important Labels

Consumers more influenced by labels when shopping for food than when eating away from home

## Labeling Influence on Purchasing Behavior



Q47a: Which of the following, if any, do you do on a regular basis (that is, most times when you shop for foods and beverages)? Buy foods and beverages because they are advertised on the label as...? Select all that apply. (Split Sample A, n=505)  
Q47b: Which of the following, if any, do you do on a regular basis (that is, most times when you eat away from home)? Eat at restaurants because they advertised their foods and beverages as...? Select all that apply. (Split Sample B, n=504)



INTERNATIONAL  
FOOD INFORMATION  
COUNCIL FOUNDATION

# Bioengineered Food Disclosure Survey

Consumer Perceptions and Reactions to Various Stimuli and Visuals Related to  
Bioengineered Foods

June 2018

# Introduction


## Research Objectives

- Measure consumers' general awareness and understanding of genetically modified / bioengineered foods, and how consumers currently react to these food products when grocery shopping.
- Understand how consumers' attitudes and perceptions vary when viewing different methods of expressing the presence of bioengineered ingredients in food products. Measure reactions to both visual (logo) and textual formats.

## Sampling

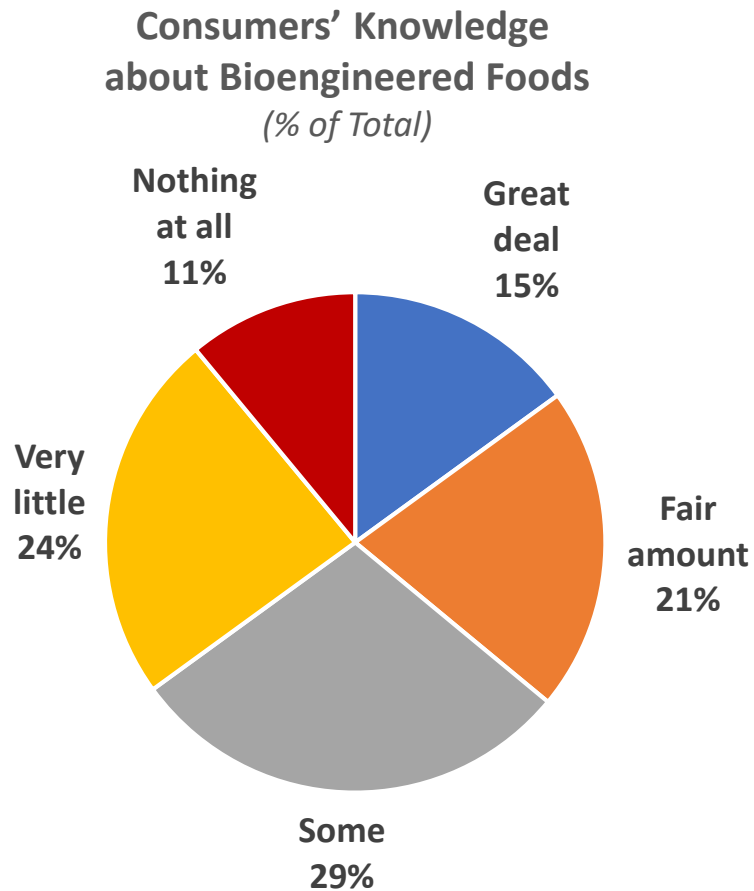
- ✓ Research Now Online Panel
- ✓ Sample size
  - 1002 total US respondents
  - Representative distribution by region, gender, age, education, race / ethnicity and household income

## Methodology

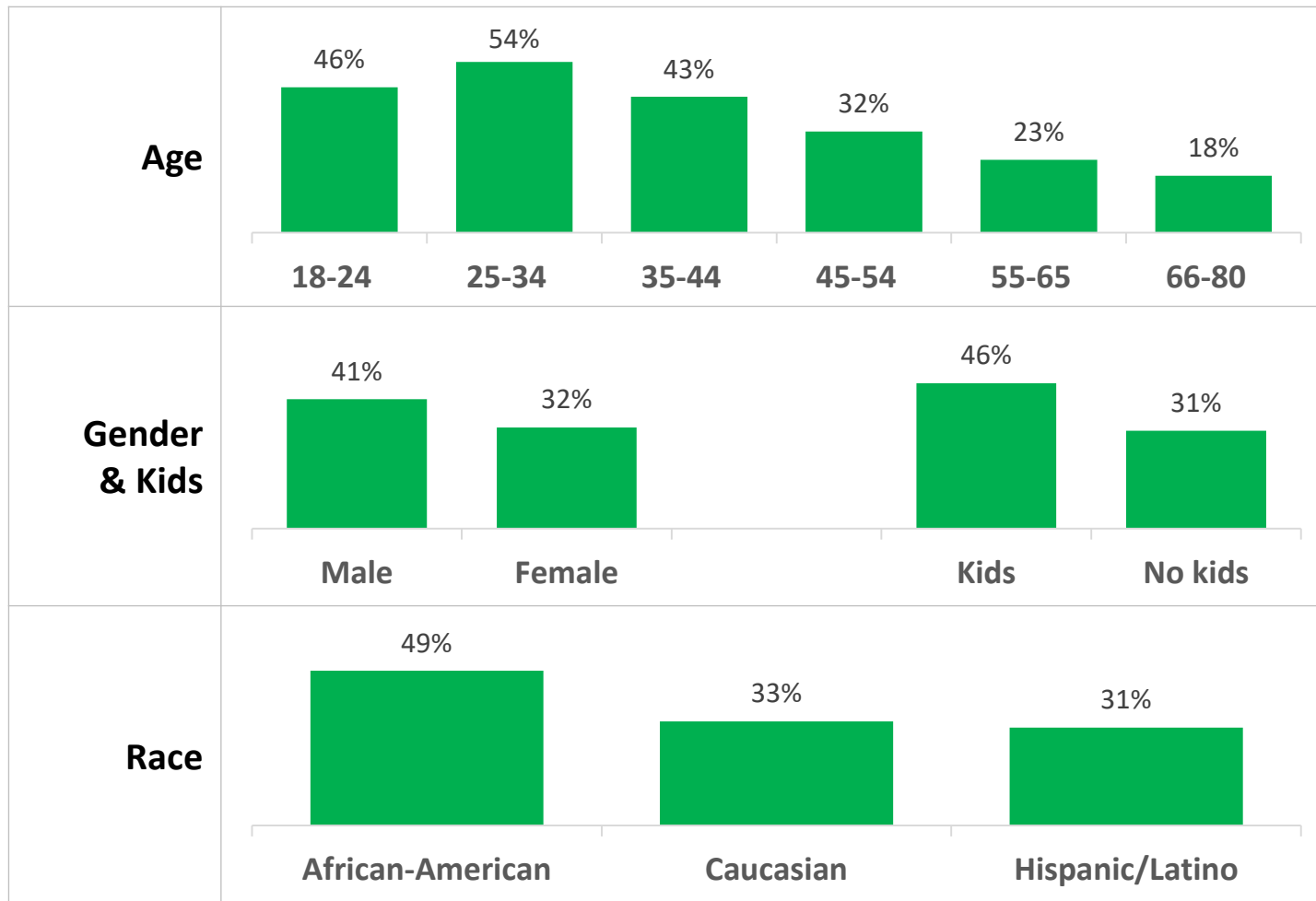
- ✓ Survey Conducted
  - May 18-27, 2018
- ✓ **Average Length of Online Survey** 
  - 15 minutes
- ✓ **Qualification Criteria**
  - Age 18-80
  - Sole or shared responsibility for household's grocery shopping



The same percent of consumers that know very little or nothing at all (36%) say they know a great deal or fair amount (36%) about bioengineered foods. Those who claim to be the most knowledgeable about bioengineered foods tend to be young, male, parents and African-American.



(% Great Deal + Fair Amount)



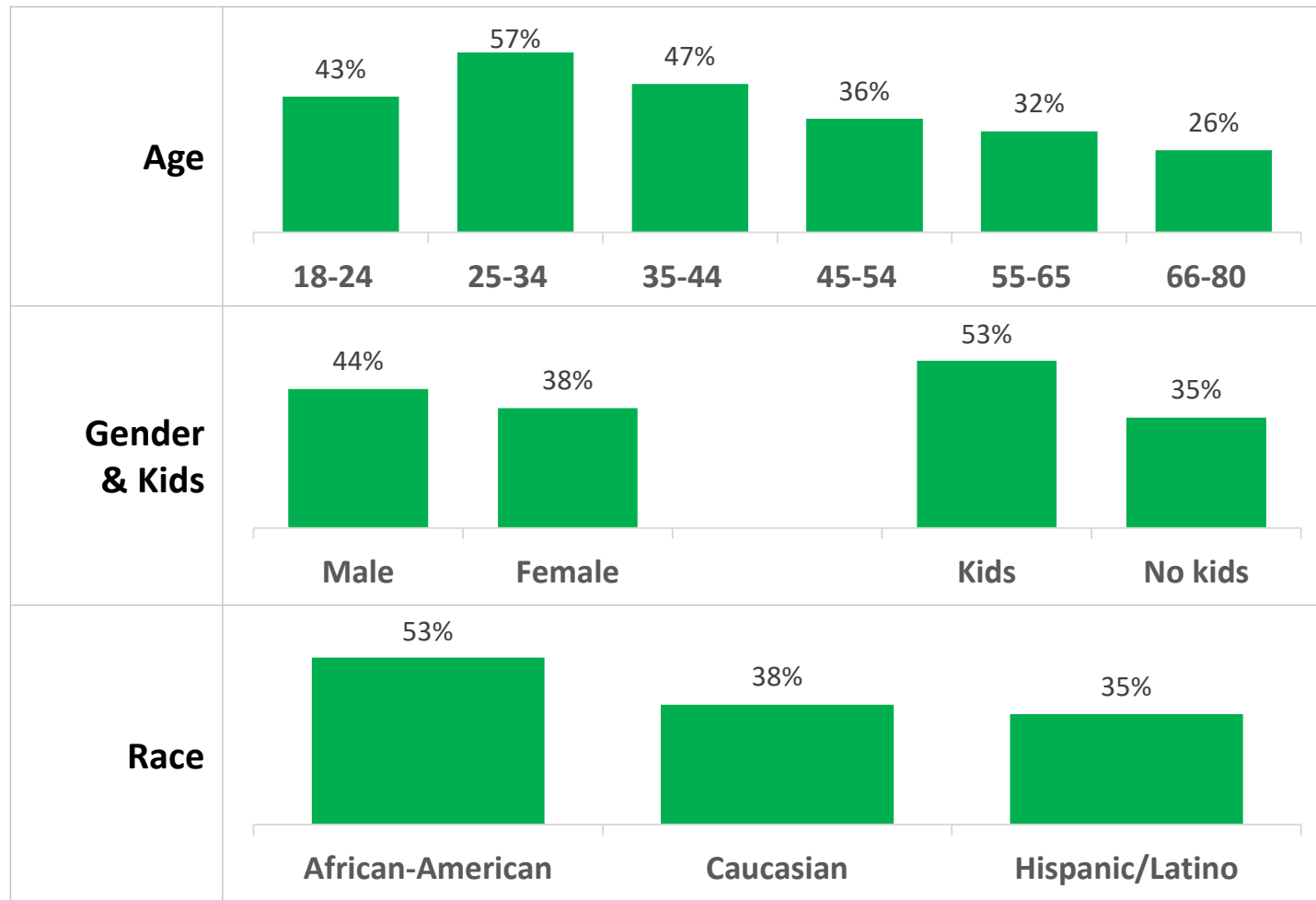
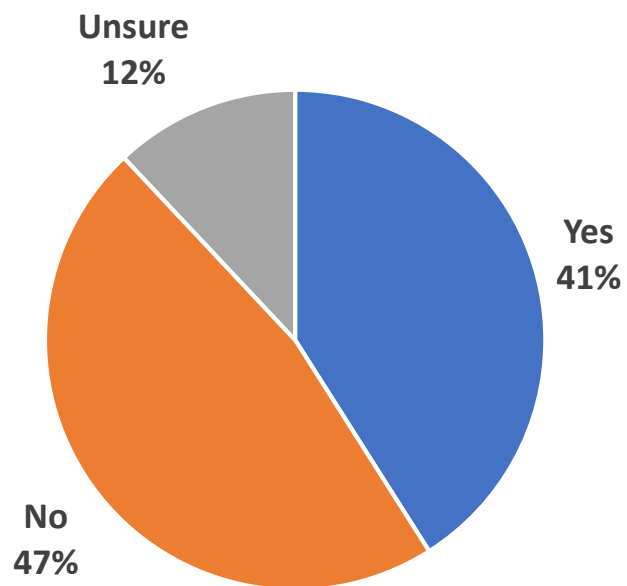
Q2. How much do you know about bioengineered/genetically modified foods?  
Base=Total Respondents; n=1002

Nearly half of consumers do not consider whether foods are genetically modified (47%). Two in five consumers consider the genetic modification of foods when buying them (41%). Those who consider whether or not food they intend to purchase are genetically modified tend to be young, male, parents and African-American.

(% Yes)

**Considered whether Foods were Genetically Modified when Buying**

(% of Total)

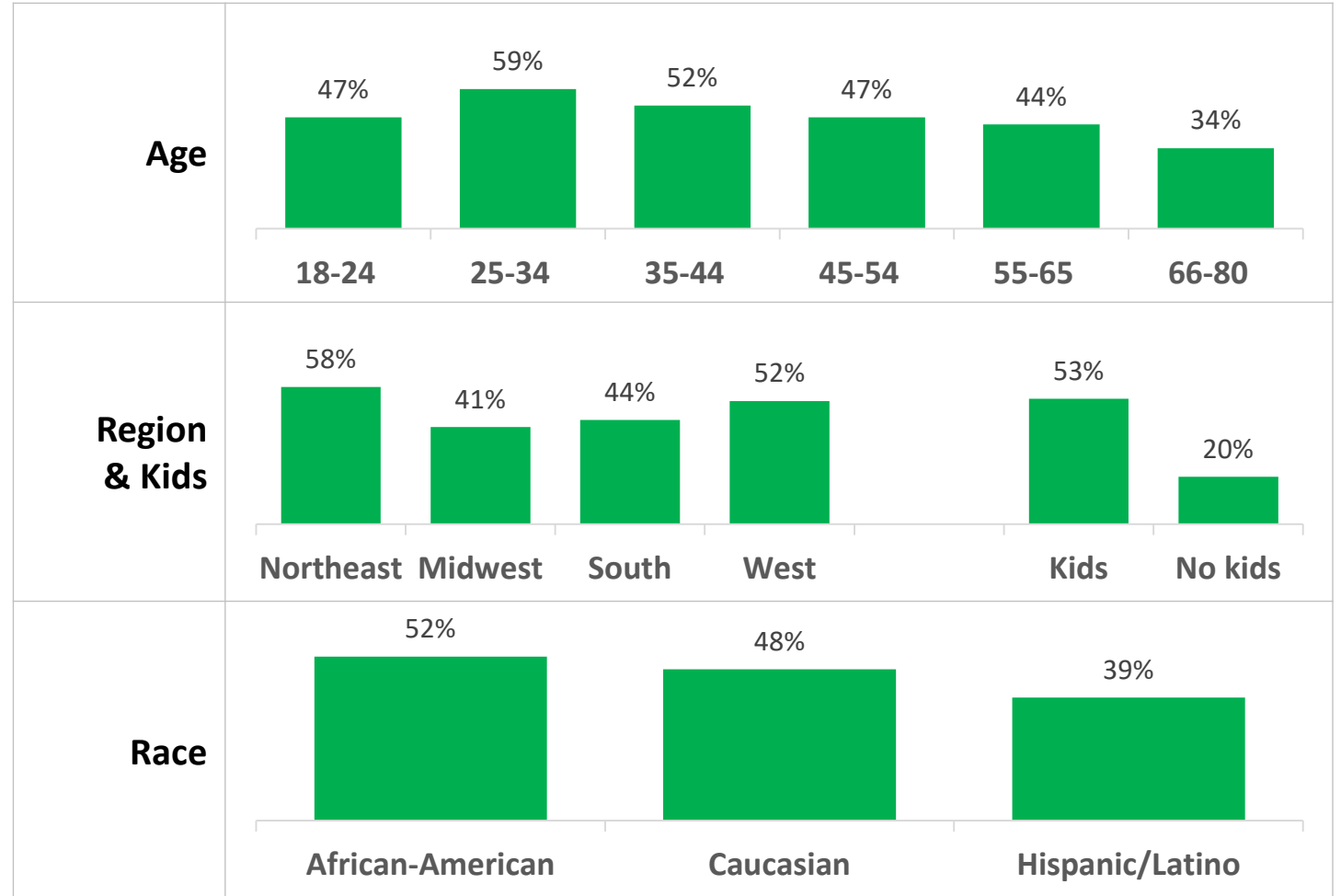
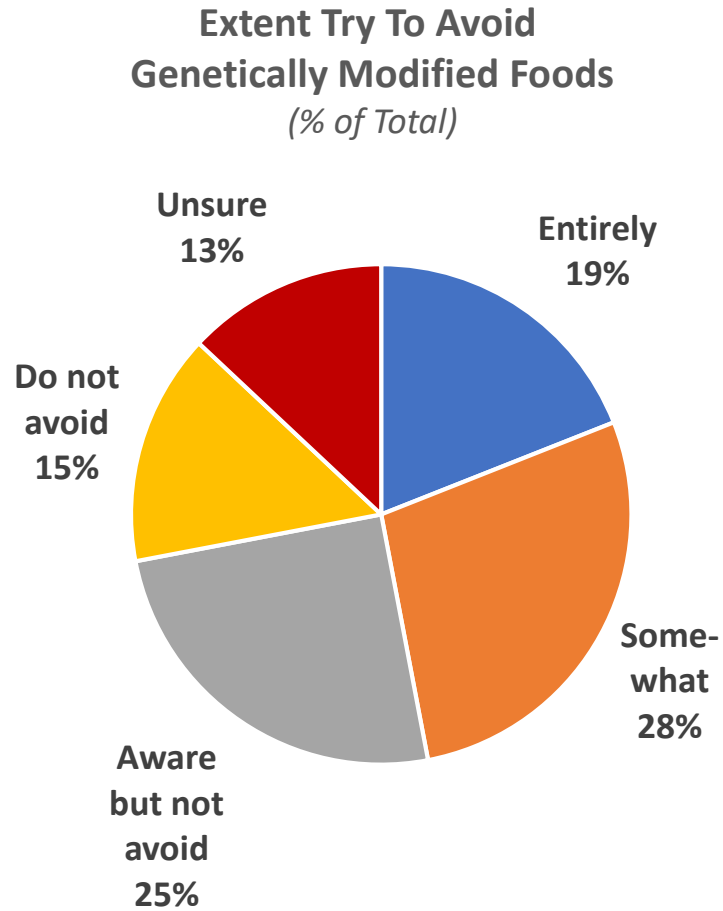


Q3. Thinking back about the past twelve months, when making decisions about buying foods and beverages, did you consider whether or not they are genetically modified or bioengineered (BE)?

Base=Total Respondents; n=1002

Almost half of the surveyed consumers avoid at least somewhat genetically modified foods (47%). Slightly less do not avoid (40%). Avoiders of bioengineered foods tend to be younger, from the Northeast and West, have children at home, and are African-American.

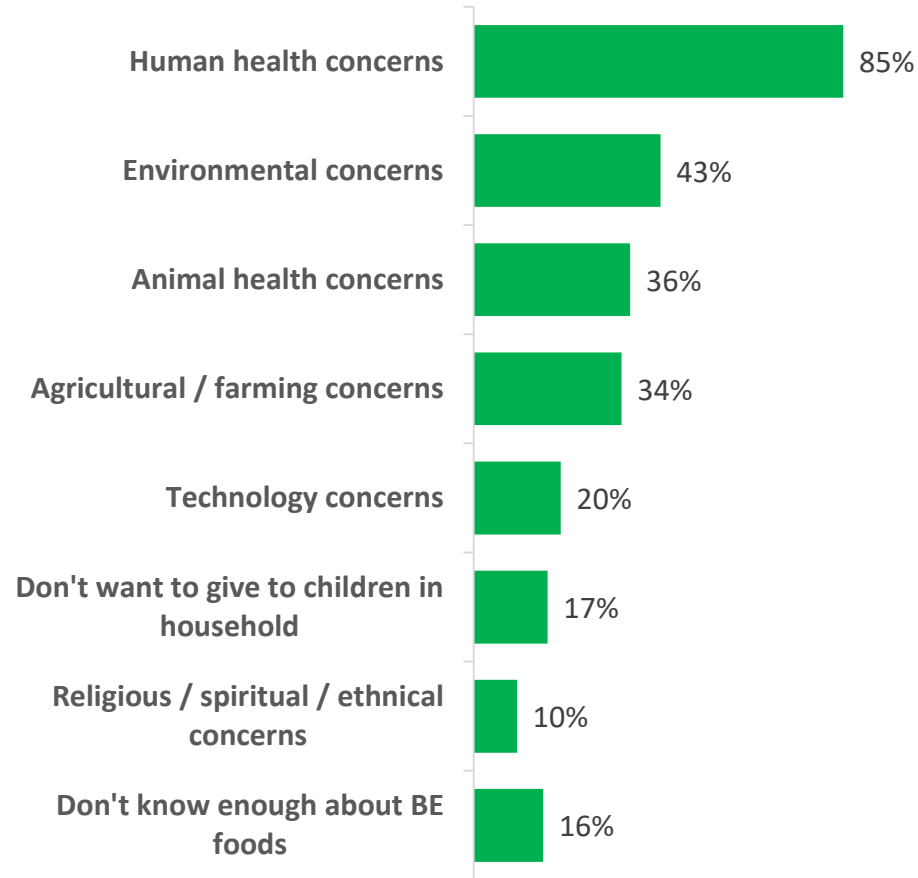
(% Entirely + Somewhat)



Q4. To what extent do you try to avoid foods that have been genetically modified/bioengineered (BE)?  
Base=Total Respondents; n=1002

Human health concerns are the primary reason consumers avoid BE foods, then concerns dip significantly. Following human health are environmental and animal health concerns.

**Reasons To Avoid BE Foods**  
*(% of Those Who Avoid)*



Q5. Why do you avoid BE foods?

Base=Try to avoid foods that have been genetically modified; n=476

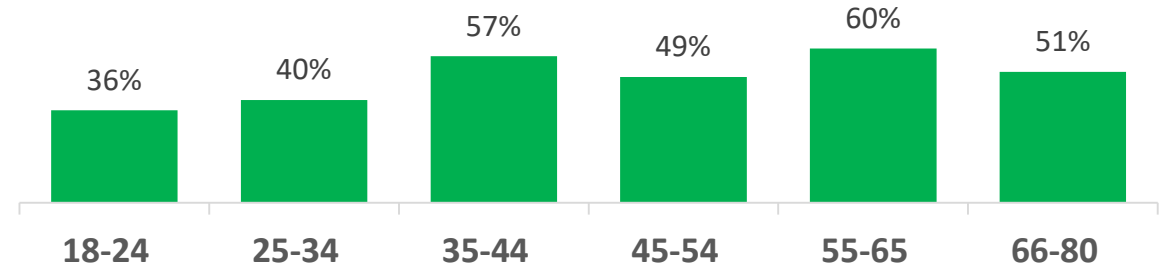


Uncertainty about which foods are genetically modified is the primary reason for not avoiding BE foods. Older consumers are more likely to avoid certain foods due to a lack of knowledge. A majority of respondents (53%) say they are less likely to consume food if they know it contains BE ingredients. Nearly half (47%) would either have no change or would be more likely to consume these foods.

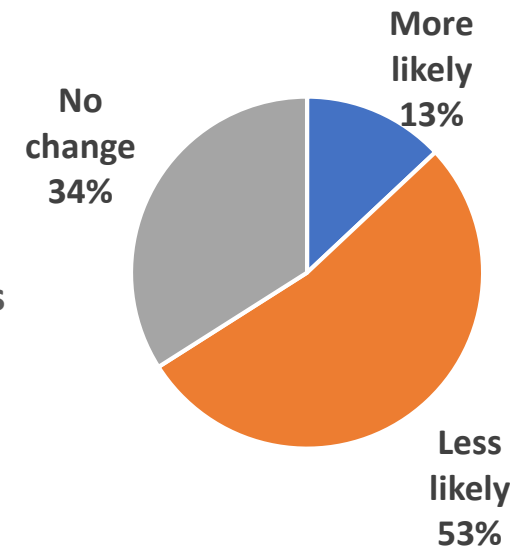
**Reasons NOT To Avoid BE Foods**  
 (% of Those Who Do Not Avoid)



**Unsure which Foods Contain BE Ingredients by Age**  
 (% of Those Who Do Not Avoid in Each Age Group)



**Likelihood to Consume BE Foods If Knew Which Foods Contained BE Ingredients**  
 (% of Total Respondents)



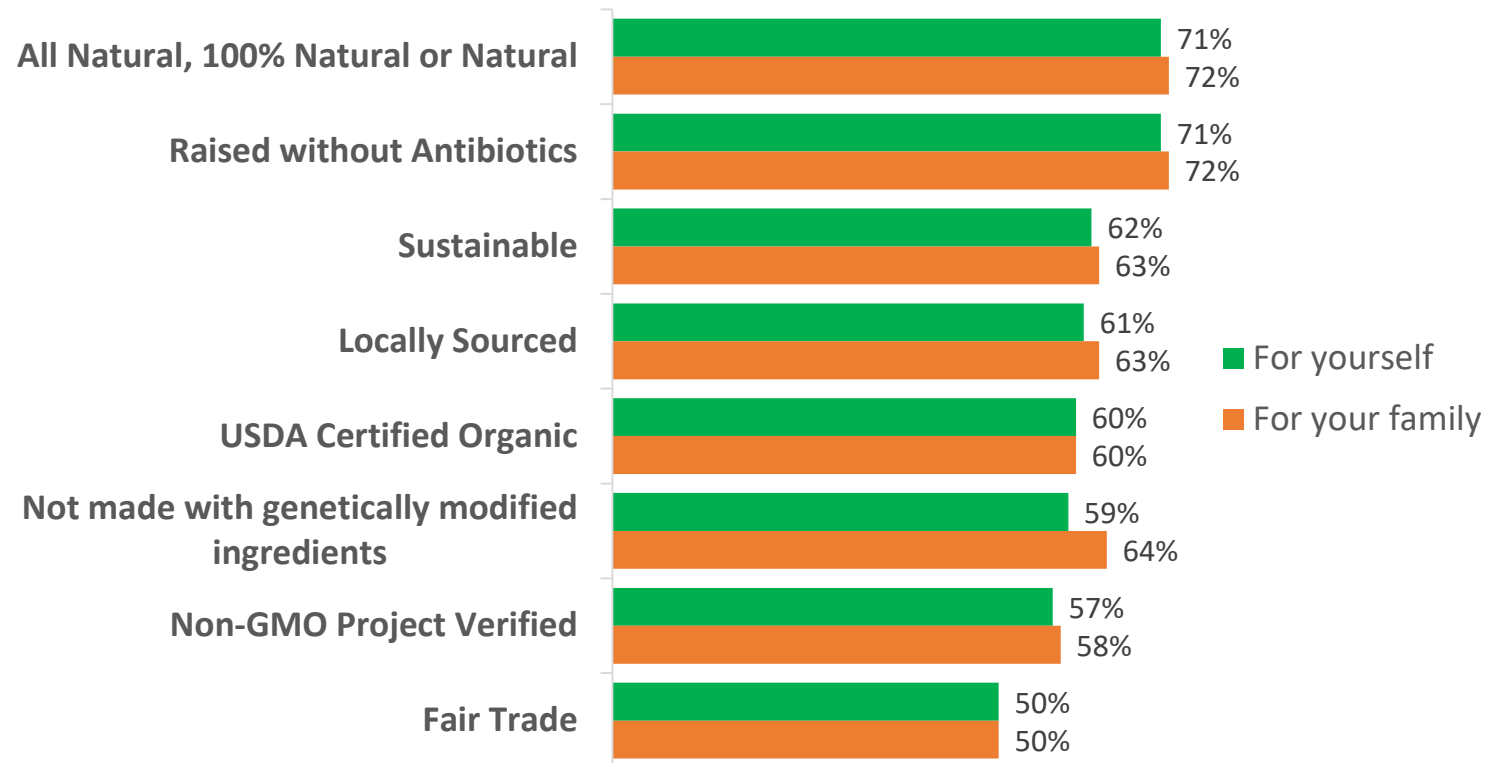
Q7. Why don't you seek to avoid BE foods?

Q6. What types of BE foods do you try to avoid.

Base=Try to avoid foods that have been genetically modified; n=395; Total=1002

There is agreement about the importance of labels/claims for both yourself and your family; “all natural, 100% natural or natural” and “raised without antibiotics” are the most important claims.

**Importance of Labels or Claims  
When Seeking Out Foods To Buy**  
(% Important + Very Important; Base=Total Respondents)



Q9. How important are the following labels or claims when seeking out foods to buy for yourself?  
Q10. How important are the following labels or claims when seeking out foods to buy for your family?  
Base=Total Respondents; n=1002

The logo-only option receives the lowest price - \$2.63; while the All Natural option receives a price equal to the Control option - \$2.96 - which is the highest amount.

### Most Consumer is Willing to Pay (Split 3 - Average Price)

Only younger consumers will pay more than others for this entire series of visuals. Other segments are not substantially different from the overall average.

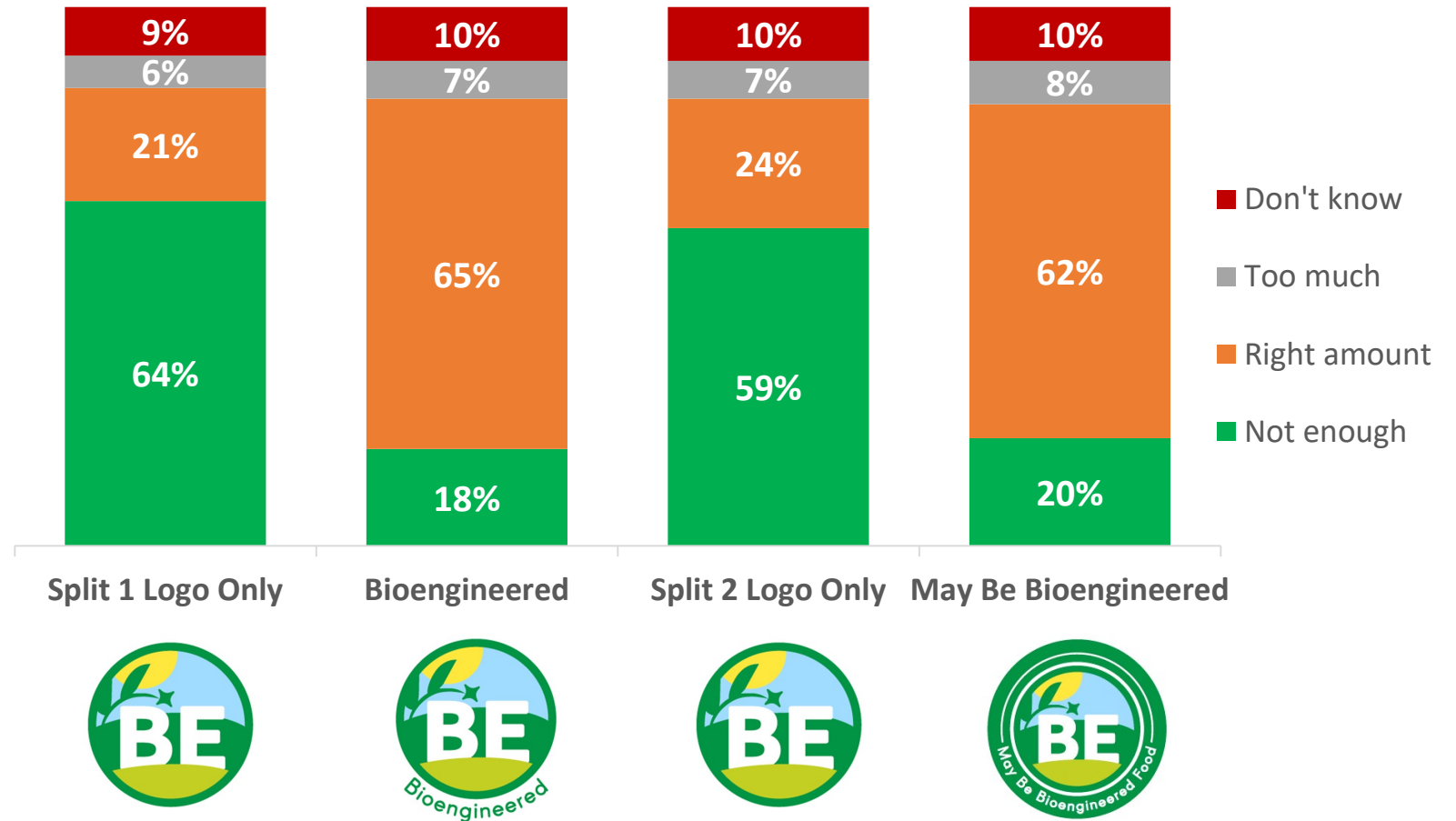


Q13. What is the most you would be willing to pay for the container on the right?  
Base=Split Respondents; n=varies; mean includes zero

Over three in five respondents say that the Bioengineered logo (65%) and May Be Bioengineered Food logo (62%) provides the right amount of information.

**Extent Labels Provide Enough Information**  
*(Split 1 + 2 - % of Total)*

Due to small sample sizes, there are no significant differences by segment to these logo options.

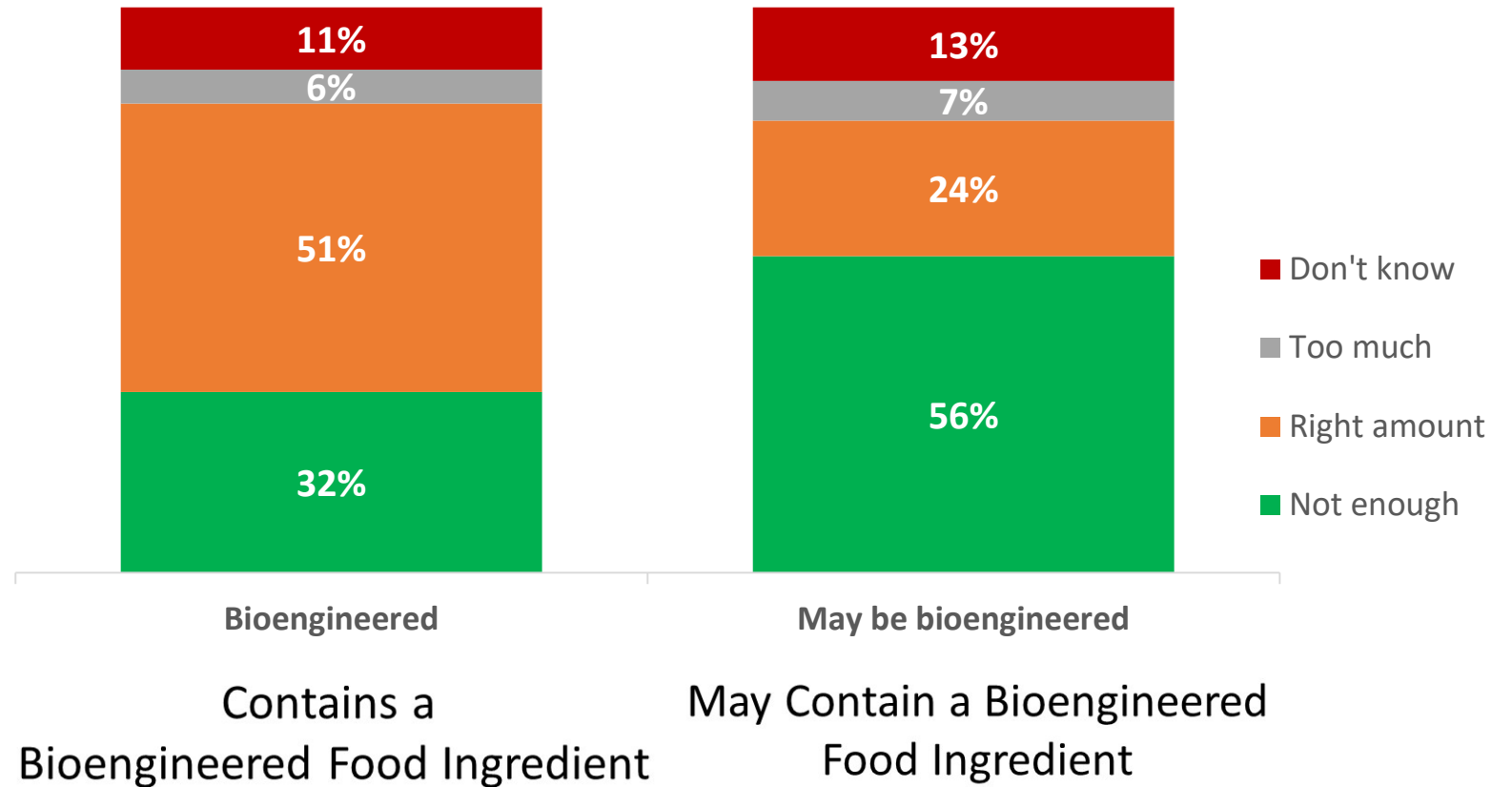


Q16. Do these labels/text contain...?  
 Base=Split Respondents; n=varies

“Contains” a Bioengineered Food Ingredient (51% right amount of information) is clearly preferred over the “May Contain” statement (56% not enough information, 24% right amount of information).

**Extent Labels Provide Enough Information**  
*(Split 7 - % of Total)*

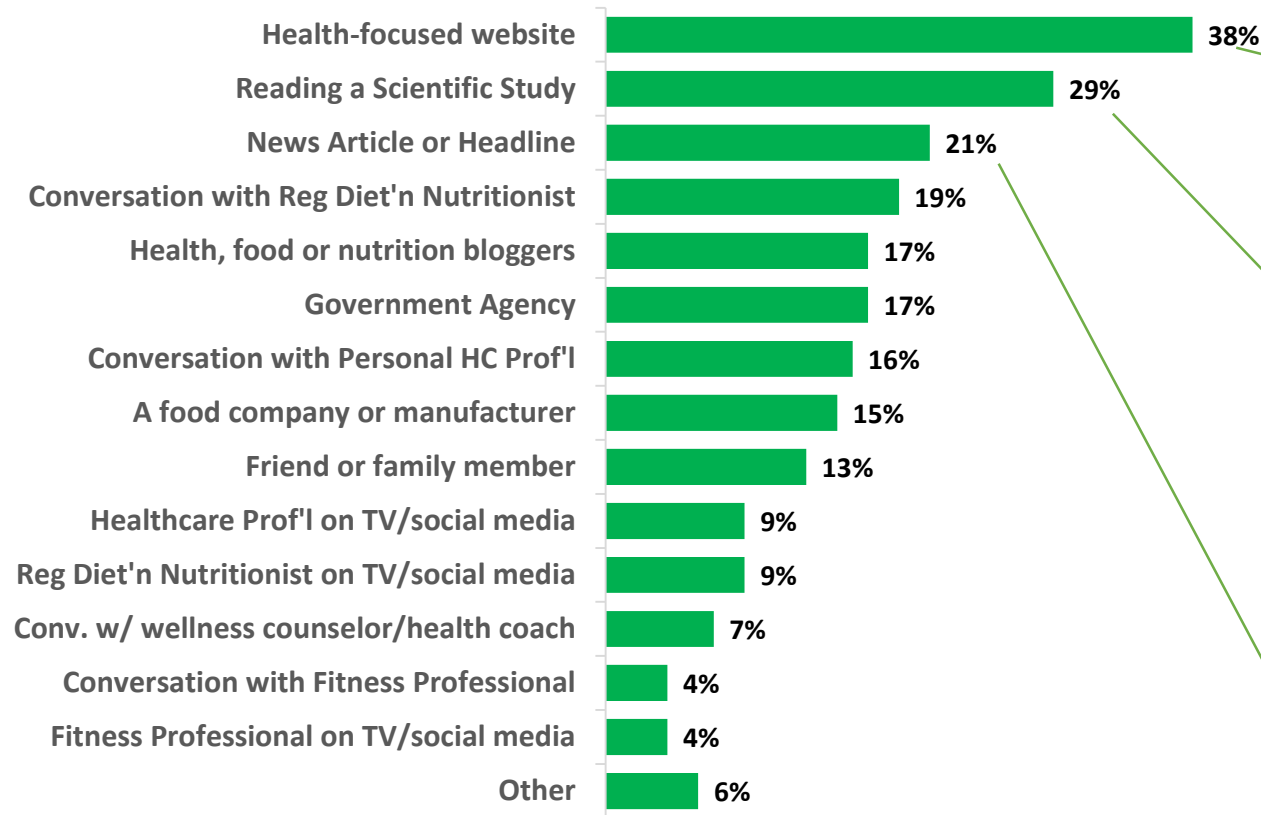
For this option which shows no logos and only text, there are no significant differences in perceptions by segment.



Q16. Do these labels/text contain...?  
 Base=Split Respondents; n=varies

Health-focused websites would be visited by 38% of consumers that wished to learn more about BE foods.

**Where Consumer Would Look for Information about BE Foods**  
*(% Selected as One of Top Three)*



Health-focused website is ranked #1 by nearly all respondent segments. However, a health-focused websites is significantly more important to older respondents (from 39% to 46%) and women (41%) compared to other segments.

Older respondents (from 32%-35%) are also more likely to read a scientific study, along with Caucasians (34%), those more highly educated (36%) and consumers with children (32%).

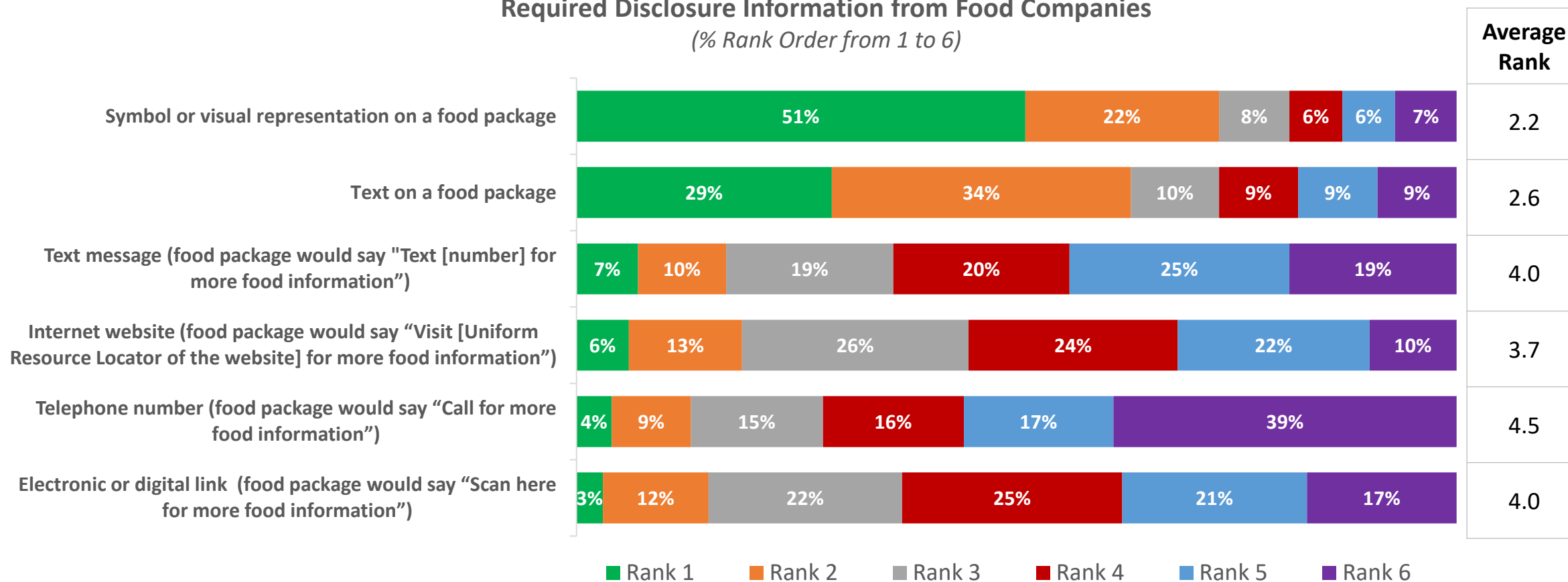
Consumers with the highest income levels are most likely to read news articles (35%).

Q17. If you wanted to learn more about BE foods, where would you seek out additional information?  
 Base=Total Respondents; n=1002

Consumers want BE labels on food packaging; they do not want to have to work at obtaining BE information. Either a symbol or visual representation on the food package (51% rank #1) or text on a food package (29% rank #1) are the most popular ways that consumers want to receive/view BE food ingredient information.

### How Consumer Would Prefer To Receive Legally Required Disclosure Information from Food Companies

(% Rank Order from 1 to 6)



Q19. If BE food or BE food ingredient information is legally required to be provided by food companies, please rank (with 1 being the top priority and 6 being the lowest priority) how you would like to receive this information. Base=Total Respondents; n=1002

## BE Disclosure Media

New labels are coming to your food — and you can help decide

*WTOP*

Do refined ingredients count as GMOs?

Concerns about GMOs prompt consumer demand for labels

*FoodDive*

Are GMO Foods Safe? Labeling 'Modified' Products Make Them Less Scary to Consumers, Study Says

*Newsweek*

Simple labels increase consumer acceptance of GMOs, study finds

*Agri-Pulse*

Survey finds 80% of Americans want G.M.O. information on packaging

*FoodBusiness News*





INTERNATIONAL  
FOOD INFORMATION  
COUNCIL FOUNDATION

# Thank you

Contact:

Alexandra Lewin-Zwerdling

[Lewin-Zwerdling@IFIC.org](mailto:Lewin-Zwerdling@IFIC.org)