2018 FOOD & HEALTH SURVEY

INTERNATIONAL
FOOD INFORMATION
COUNCIL FOUNDATION

Table of Contents

BACKGROUND

The International Food Information Council (IFIC) Foundation's 2018 Food and Health Survey marks the 13th time the IFIC Foundation has surveyed American consumers to understand their perceptions, beliefs and behaviors around food and food purchasing decisions.

This year, the survey continues an examination of issues related to health and diet, food components, food production, and food safety. It also explores new topics, such as food insecurity, diets and eating patterns, and how consumers' diets compare to dietary guidelines and expert recommendations.

A supplement to this report, focused on Medicaid recipients and in partnership with the Root Cause Coalition, will be released in October, 2018.

METHODOLOGY

- Online survey of 1,009 Americans ages 18 to 80. March 12 to March 26, 2018. The survey took approximately 21 minutes to complete.
- The results were weighted to ensure that they are reflective of the American population ages 18 to 80, as seen in the 2017 Current Population Survey. Specifically, they were weighted by age, education, gender, race/ethnicity and region.
- The survey was conducted by Greenwald & Associates, using ResearchNow's consumer panel.
- Note: changes in trend vs. 2017 are indicated where appropriate with up and down arrows.

Executive Summary

This year's 2018 Food and Health Survey seeks to understand consumers' perceptions and behaviors around food and food purchasing decisions.

- The findings from this year's online survey of 1,009 Americans ages 18 to 80 focuses on:
  - The link between food and desired health outcomes
  - How consumer diets compare to recommendations
  - The prevalence and motivation behind certain eating patterns
  - Information sources and trust
  - Food and beverage purchase drivers
  - The influence of food values and views on food safety
  - Food insecurity and barriers to healthy eating
  - In-person vs. online shopping
- Findings are presented for all respondents. Additional insights are provided based on how findings vary by different types of demographic groups such as age, race, gender and income.

Key Findings

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

- **Consumer confusion remains entrenched:** Last year, the study found consumer confusion to be a prevalent issue. That finding is confirmed again in 2018, with 80% who come across conflicting information about food and nutrition and 59% of those who say that conflicting information makes them doubt their choices. This significant consumer segment also experiences heightened stress while shopping.
- **Context can influence the consumer's judgment of healthfulness, even when the nutritional facts are the same:** Despite being given two products to consider with identical Nutrition Facts Panels, consumers are swayed by the presence of GMOs, a longer ingredients list, sustainable production, freshness and a sweeter taste.

Key Findings Continued

Executive Summary

Key Findings Continued

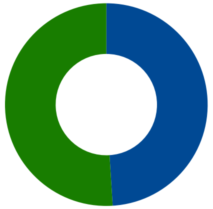
- **Familiarity is a core purchase driver**: While taste and price still reign supreme as influential factors, familiarity (a new addition to the 2018 survey) actually comes in a close third. The impact of familiarity of product even outweighs healthfulness.
- **Importance of sustainability on the rise**: 6 in 10 consumers say it is important to them that the food they purchase or consume is produced in a sustainable way, an increase from 50% who said the same in 2017. In particular, reducing pesticide use and ensuring an affordable food supply appear to be the issues driving this increased interest in the topic.
- **Preference for no artificial ingredients and willing to pay for it:** Despite the importance of familiarity, 7 in 10 consumers would be willing to give up a familiar favorite product for one that did not contain artificial ingredients. Of those who would, 4 in 10 would be willing to pay 50% more and 1 in 5 would pay 100% more. That said, there are about 4 in 10 who would pay nothing more for the new product.
- **Interestingly, trust in government agencies seems to be on the rise:** Consumers put more trust in government agencies to tell them what foods to eat or avoid. In addition, consumers are more confident in purchasing meats and poultry in the wake of new FDA regulation on antibiotics than they were in 2017.
- **Doctors are both trusted and influential sources:** For those consumers who get information from their personal healthcare professional, 78% indicate making a change in their eating habits as a result of those conversations.
- **Cost and access are key barriers to eating fruits and vegetables:** On average, Americans consume less fruits/vegetables and more protein than even they think experts would recommend. The top two reasons for this: the cost of and lack of access to good quality fruits/vegetables.

Demographic Profile of Respondents

General Demographics

Gender

Male	49%
Female	51

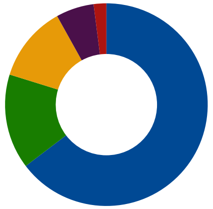


Age

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

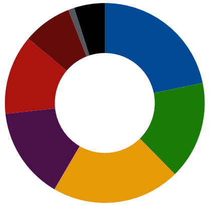
Race/Ethnicity

White	64%
Hispanic/Latino/Spanish descent	15
Black or African American	12
Asian or Pacific Islander	6
Other	2



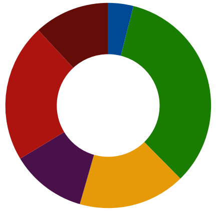
Household Income

Less than $35,000	22%
$35,000 to $49,999	16
$50,000 to $74,999	21
$75,000 to $99,999	15
$100,000 to $149,999	13
$150,000 and above	8
Don't know	1
Prefer not to answer	5



Education

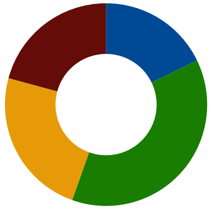
Less than high school	4%
Graduated high school	34
Some college	17
AA degree/technical/vocational	12
Bachelor's degree	22
Graduate/professional degree	12



Household Demographics

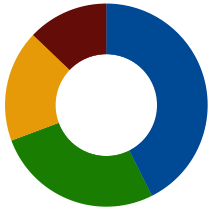
US Region

Northeast	18%
South	38
West	24
Midwest	21



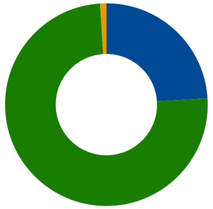
Type of location

Suburban	43%
Urban	27
Rural	18
Small town	13



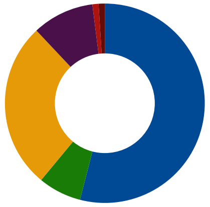
Currently have Medicaid

Yes	24%
No	75
Prefer not to say	1



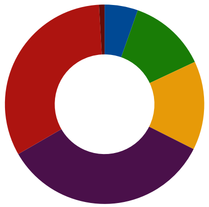
Marital Status

Married	54%
Living with partner	7
Single, never married	27
Divorced or separated	10
Widowed	3
Other	<0.5



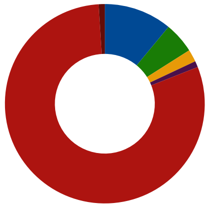
Children's Ages

Newborn to 2 years old	6%
2 to 8 years old	14
9 to 17 years old	16
18 or older	38
Do not have any children	36
Prefer not to say	1



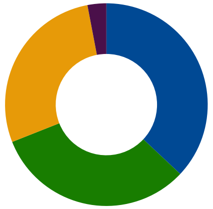
Receive food assistance

Yes, SNAP program	11%
Yes, WIC program	5
Yes, both SNAP and WIC	2
Yes, other program	1
No, do not receive food assistance	80
Prefer not to say	1

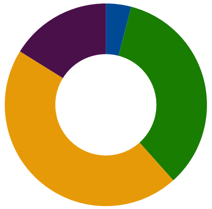


Health Demographics

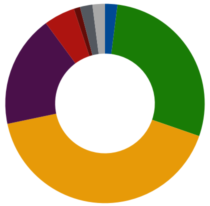
BMI score	
Normal or Low	37%
Overweight	32
Obese	28
No answer	3



Height	
Less than 5’0	4%
5’0 to 5’5	34
5’6 to 5’11	45
6’0 or taller	16



Weight	
Less than 100 pounds	2%
100 to 149 pounds	28
150 to 199 pounds	41
200 to 249 pounds	18
250 to 299 pounds	5
300 to 349 pounds	1
350 to 399 pounds	2
400 pounds or more	*
Prefer not to answer	2

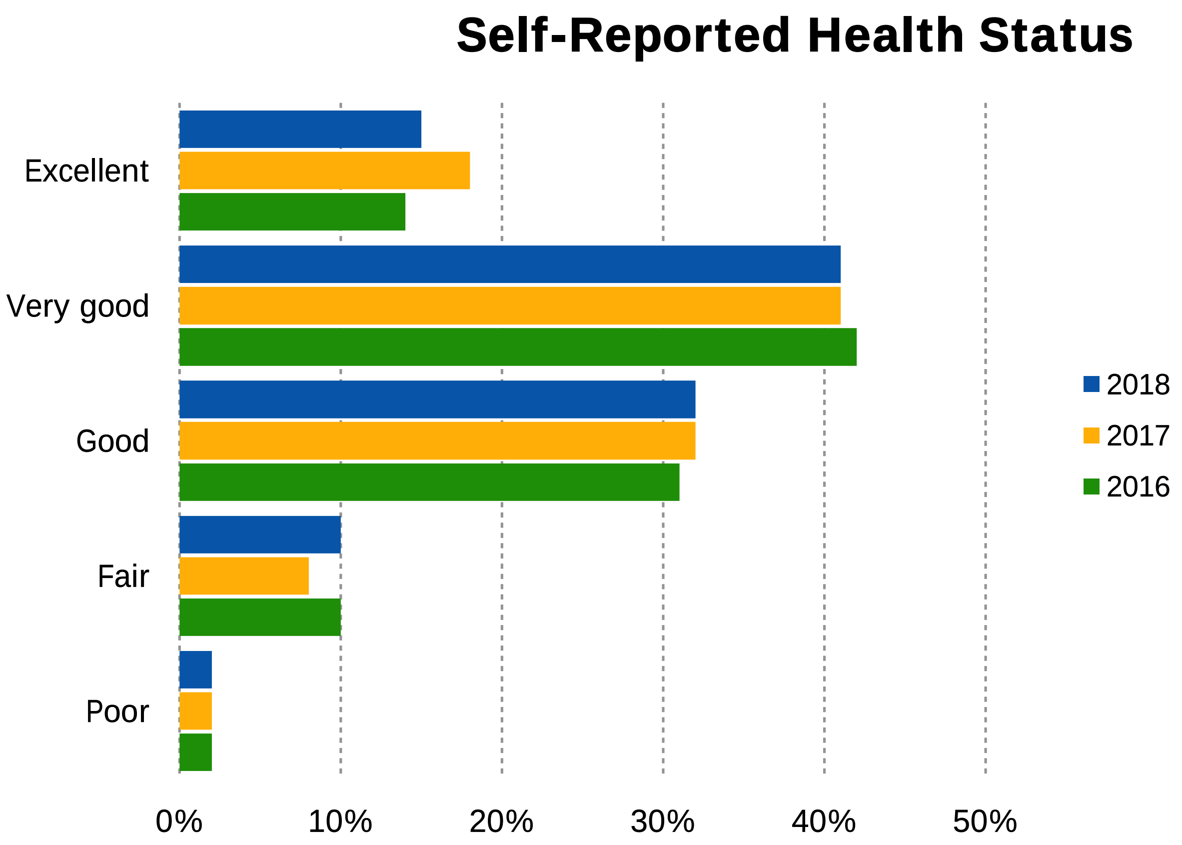


Diseases	*Multiple responses accepted*
High blood pressure	25%
High cholesterol	20%
Stress/anxiety/depression	13%
Diabetes	11%
Overweight/obesity	8%
Cancer	4%
Heart disease	3%
Muscle strength/mobility	3%
Osteoporosis	2%
Attention deficit hyperactivity disorder	2%
Stroke	1%
None of the above	49%

Consumers have Desired Health Outcomes but Unsure How to Achieve Them

Consumers View Themselves in Good Health

Despite rating health as excellent/very good, a large percentage of respondents are classified as overweight or obese



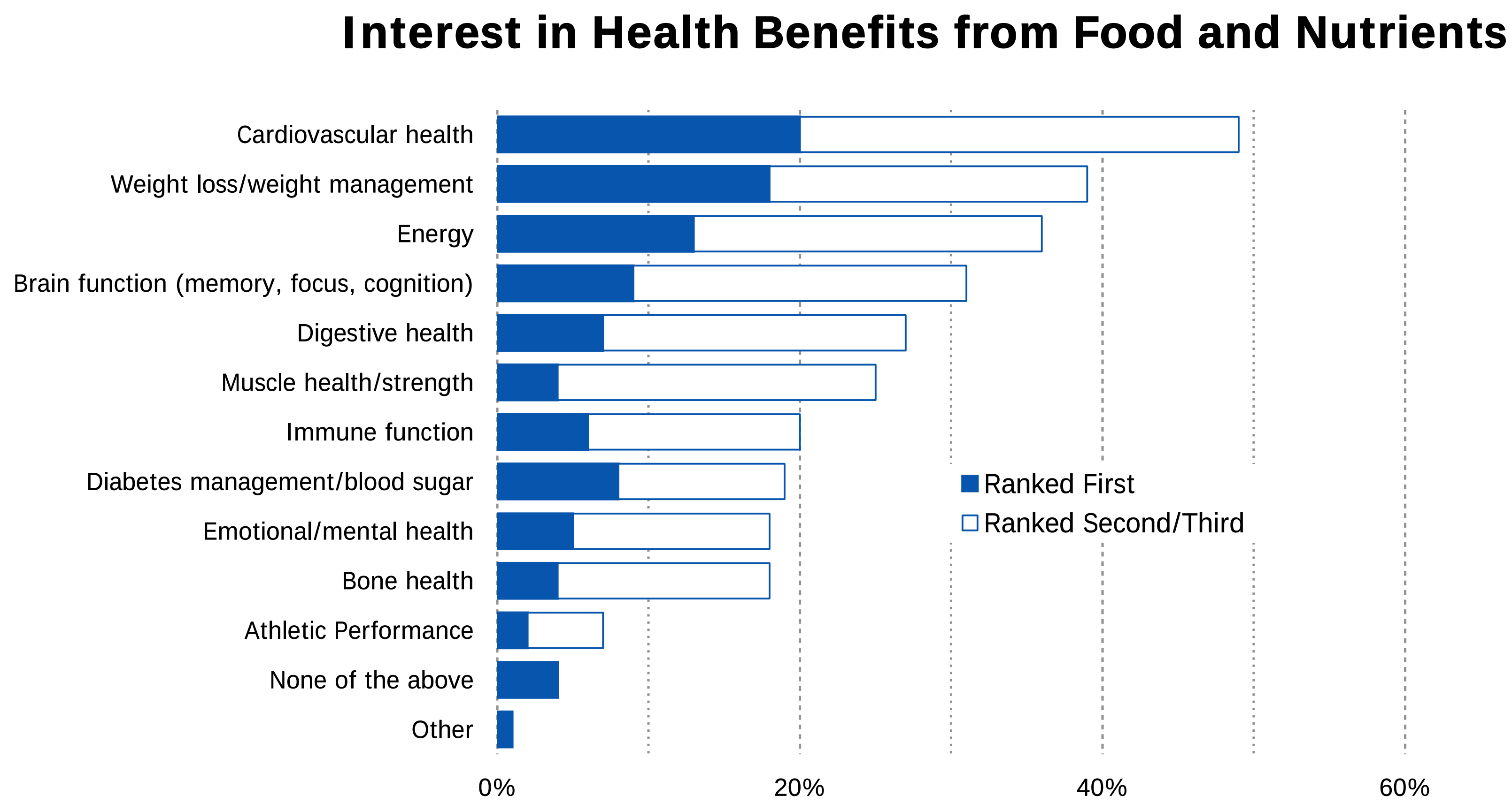
56%
Of consumers indicate their health is excellent or very good

68%
Of consumers with income above $75,000 rate health as excellent or very good, compared to **37%** of those with incomes less than $35,000

Q1: How would you describe your own health, in general? (n=1,009)

Cardiovascular Health Top Desired Benefit from Food

Weight loss, energy, and brain function also rank as top benefits consumers are interested in getting from food



24%
Of African Americans ranked weight loss as a top three health benefit, compared to **41%** of non-Hispanic whites

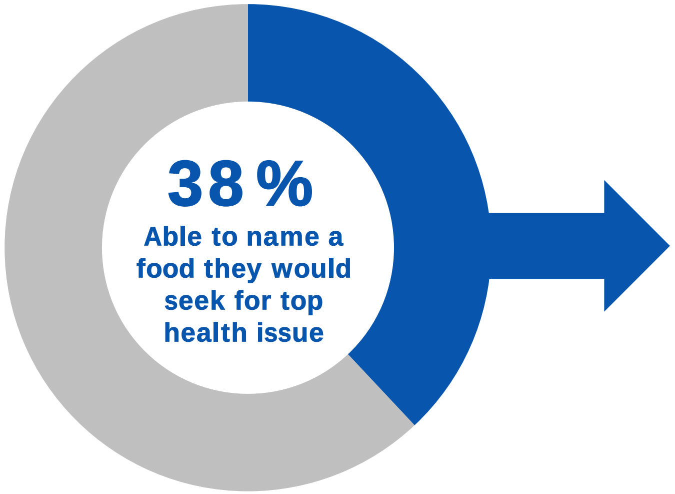
More older adults (65+) ranked bone health and diabetes management in top 3 benefits from food

Q31: Which of the following health benefits are you most interested in getting from foods or nutrients? Please rank the top 3 benefits. (n=1,009)

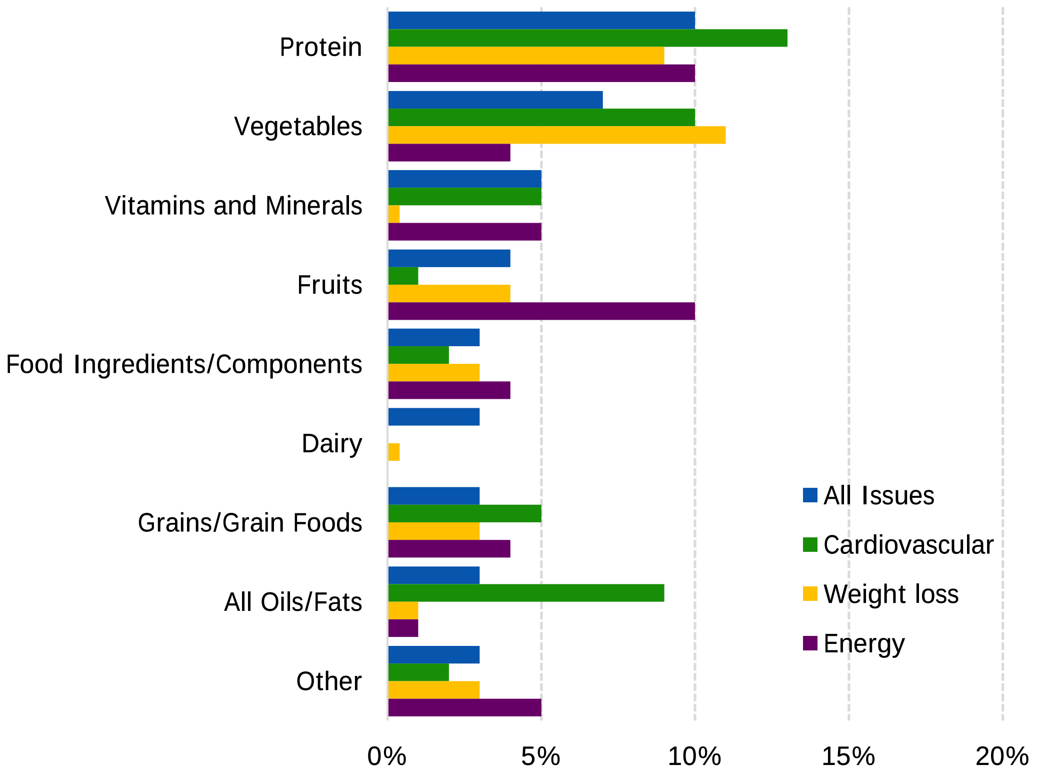
6 in 10 Could Not Connect a Food to a Goal

Protein and vegetables generally perceived as most beneficial for top health issue

Able to Link Top Health Issue to Food



Food or Nutrient Sought for Top Health Issue

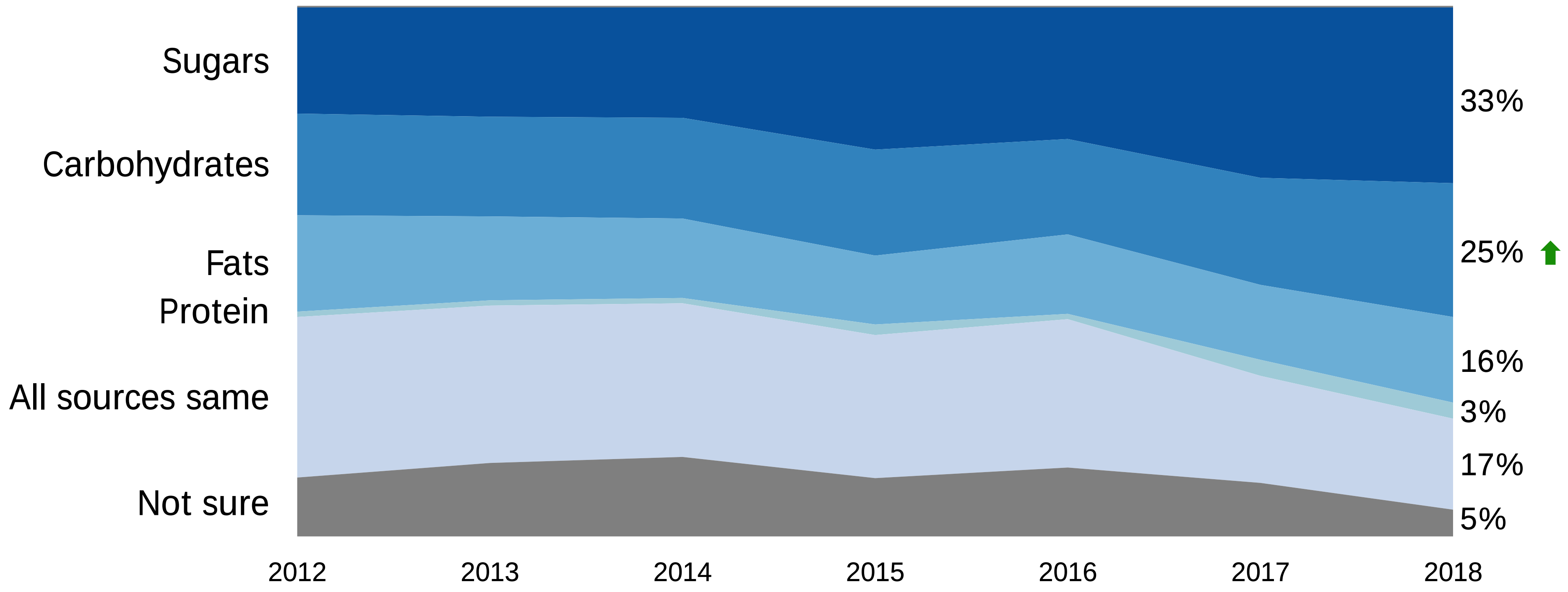


Q32: Can you name a food or nutrient that you would seek out to help with [1st Health Issue]? (Of those who mentioned a health benefit they are interested in getting from food or nutrients, n=972)

Carbohydrates Increasingly Believed to Cause Weight Gain

Sugars believed to be most likely to cause weight gain; only 17% believe calories from all sources impact weight the same

Source of Calories Most Likely to Cause Weight Gain



32%
Of those following a low-carb-related diet say that carbohydrates are most likely to cause weight gain

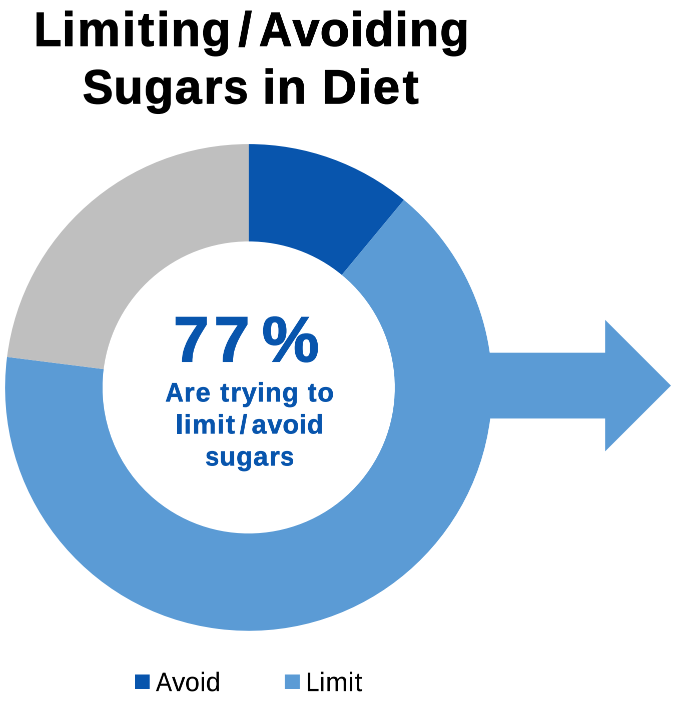
22%
Of those with a college degree indicate all sources of calories equally influence weight gain

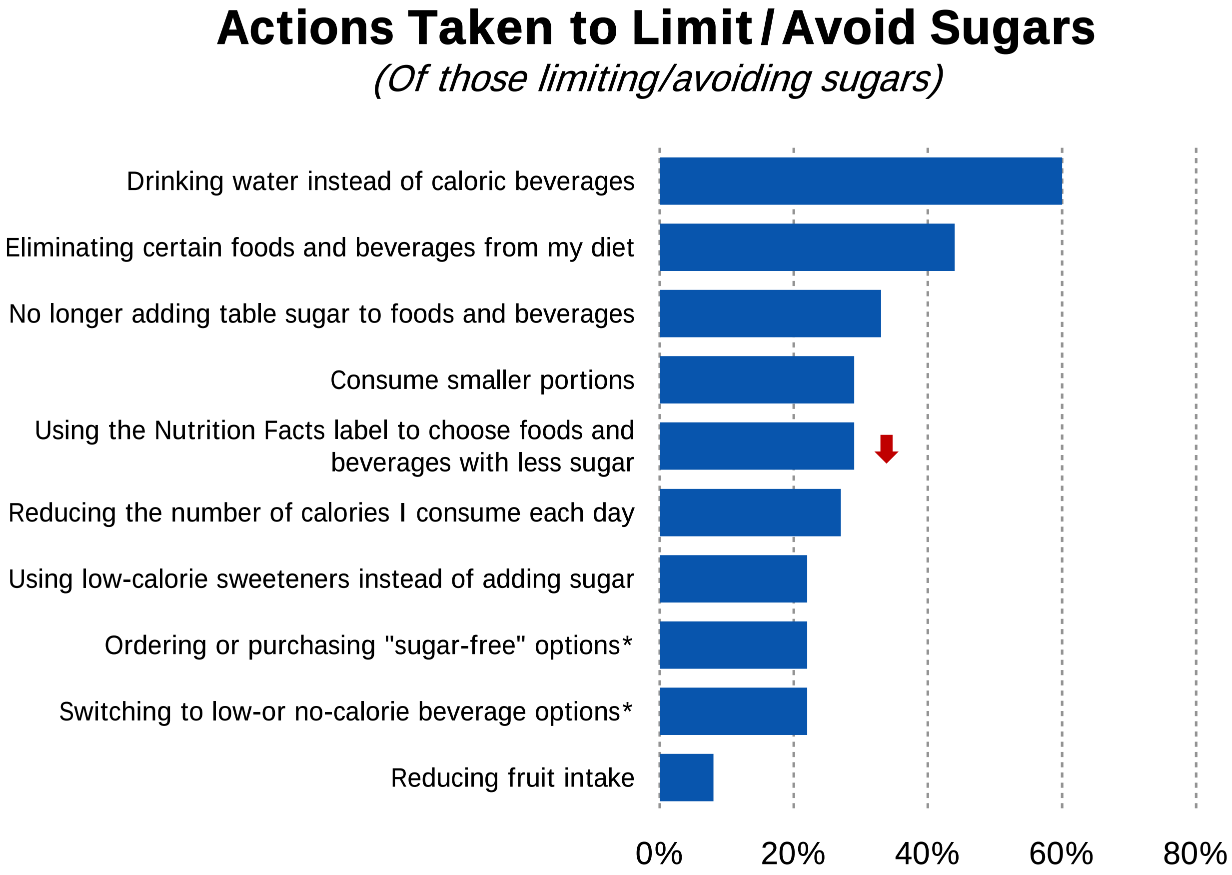
21%
Of those in excellent/very good health state all sources of calories cause weight gain

Q7: What source of calories is the most likely to cause weight gain? (n=1,009)

Consumers Take Multiple Actions to Limit Sugar

When limiting/avoiding sugar, 60 percent drink water instead of caloric beverages





Q34: Are you trying to limit or avoid sugars in your diet? (n=1,009)
Q35: What action(s) are you taking to limit or avoid sugars? (Of those limiting/avoiding sugars, n=801)
**Response text has been abridged*

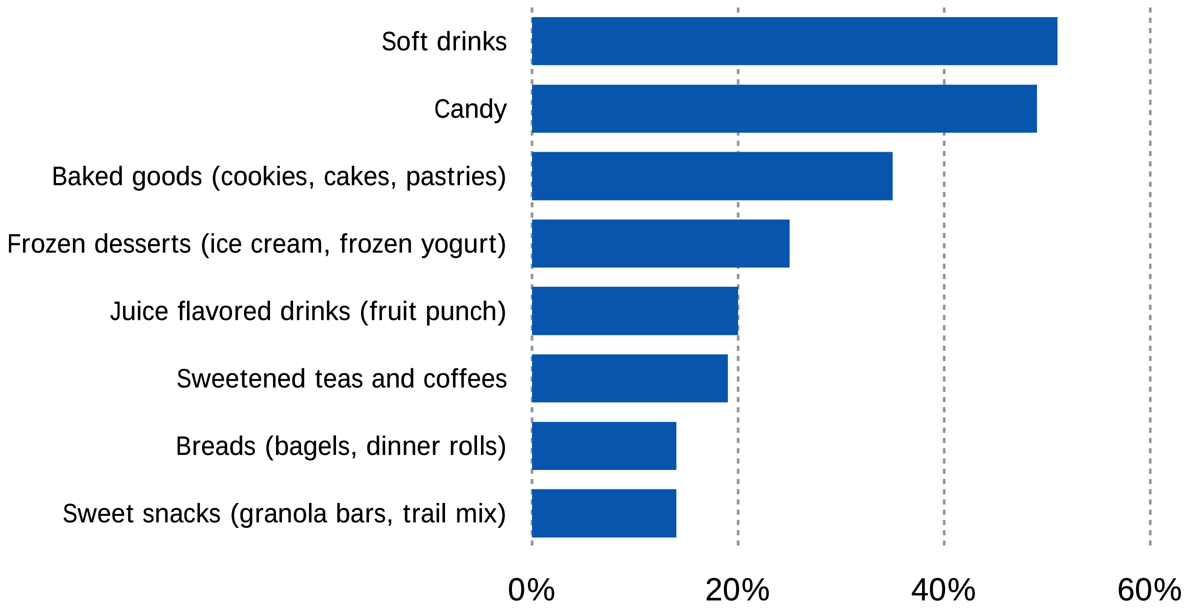
Nearly Half Eliminating Soft Drinks and Candy to Reduce Sugar Consumption

Baked goods and frozen desserts also among the most avoided

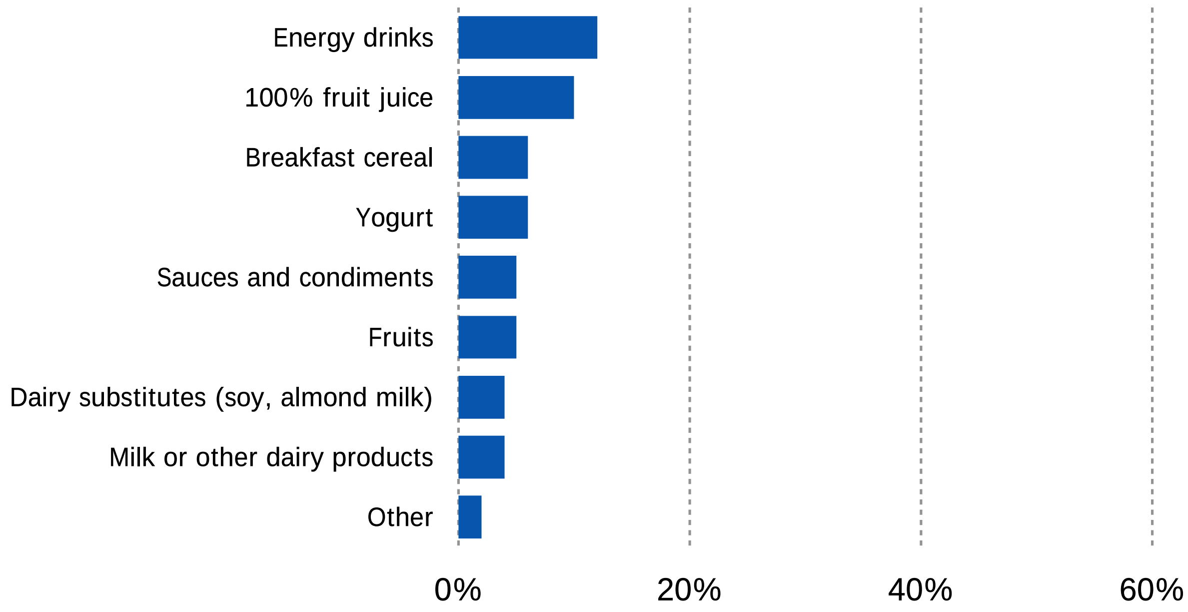
Types of Foods and Beverages Eliminated to Reduce Sugar Consumption

(Of those eliminating foods and beverages to limit/avoid sugar)

Top Responses



Less Common Responses

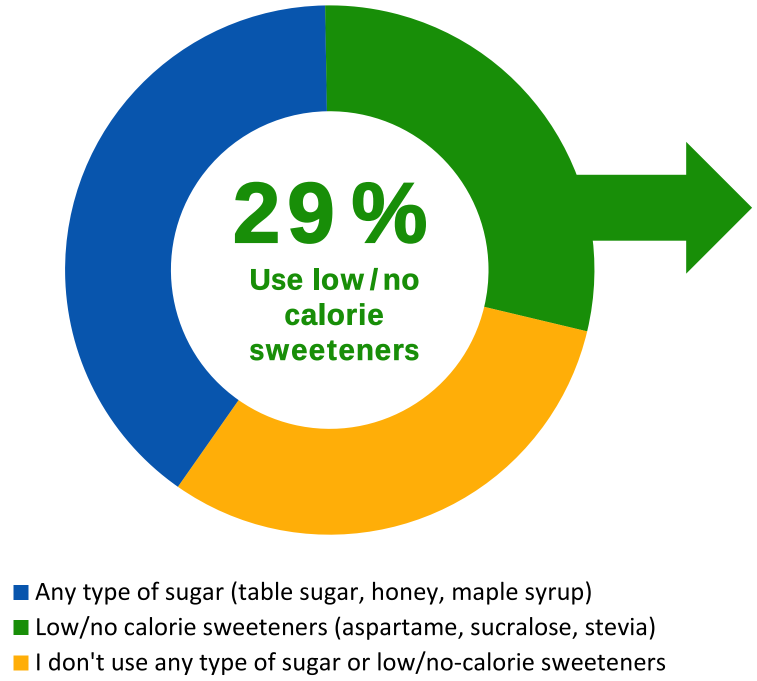


Q36: Which types of foods or beverages do you most often eliminate to reduce the amount of sugars you consume? (Select up to three.) (Of those eliminating foods and beverages to limit/avoid sugar, n=383)

3 in 10 Prefer Low/No-Calorie Sweeteners

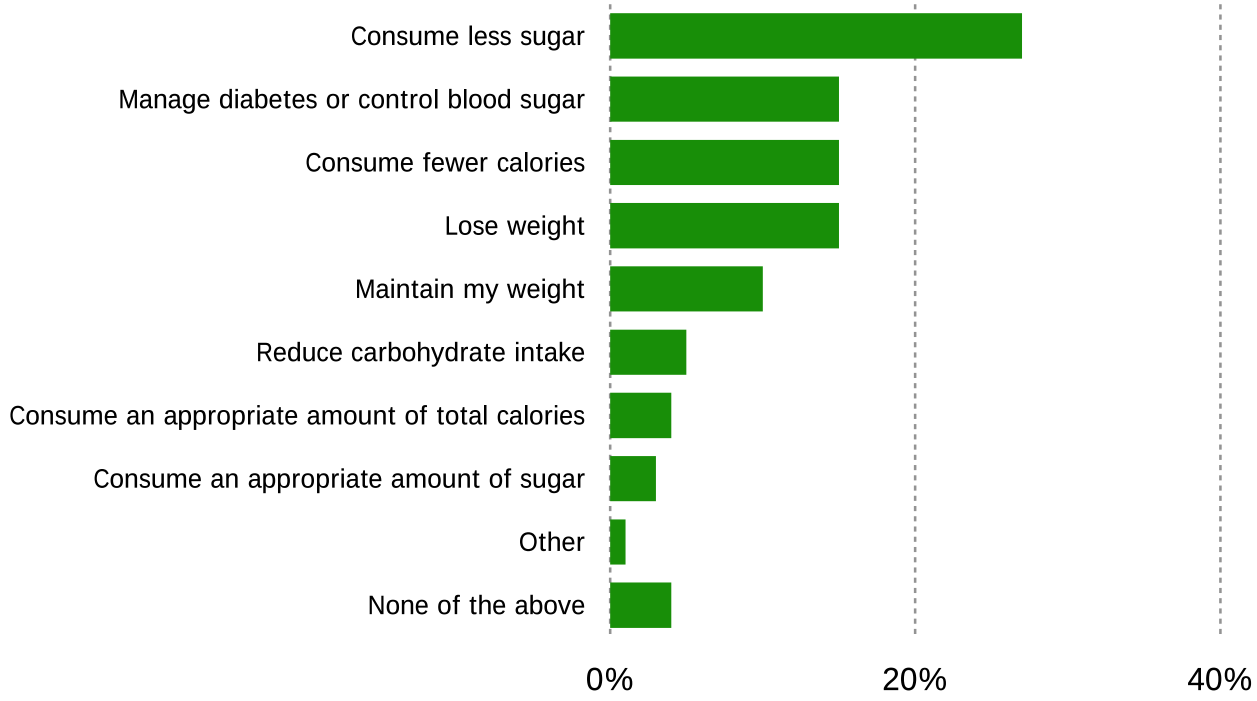
Consumers choose low/no-calorie sweeteners to consume less sugar, manage diabetes, consume fewer calories, and to lose or maintain weight

Sweeteners Likely to Use



Perceived Benefits of Using Low/No-Calorie Sweeteners

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

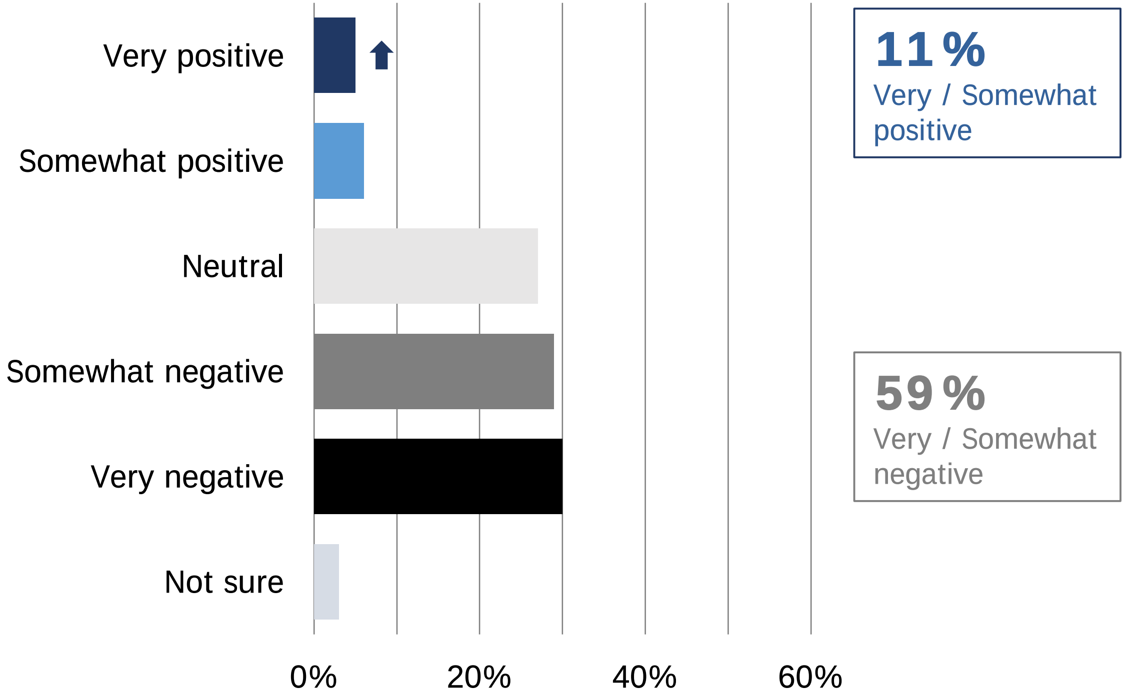


Q37: Which of the following are you more likely to use to sweeten foods and/or beverages? (n=1,009)
Q38: Which of the following, if any, do you believe consuming low/no-calorie sweeteners helps you do? (Select top answer.) (Of those who use low/no calorie sweeteners, n=301)

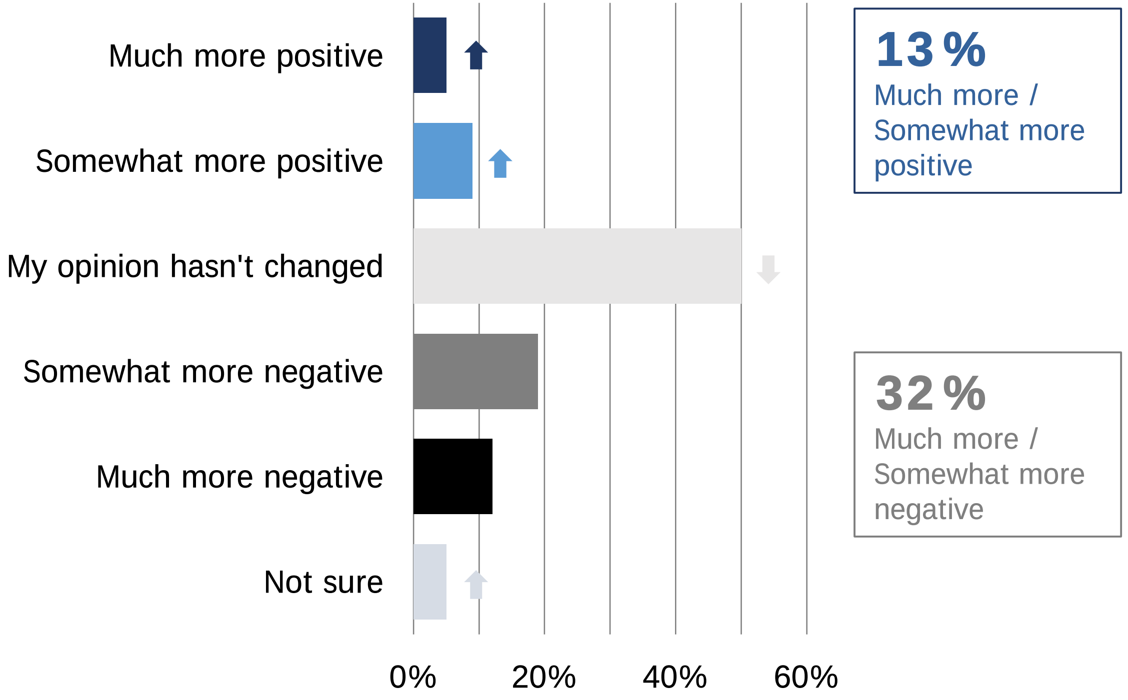
6 in 10 View Added Sugars Negatively

Nearly one-third have developed at least a somewhat more negative perception of added sugars over the past year

Opinion of Added Sugars



Change in Opinion of Added Sugars in the Past Year

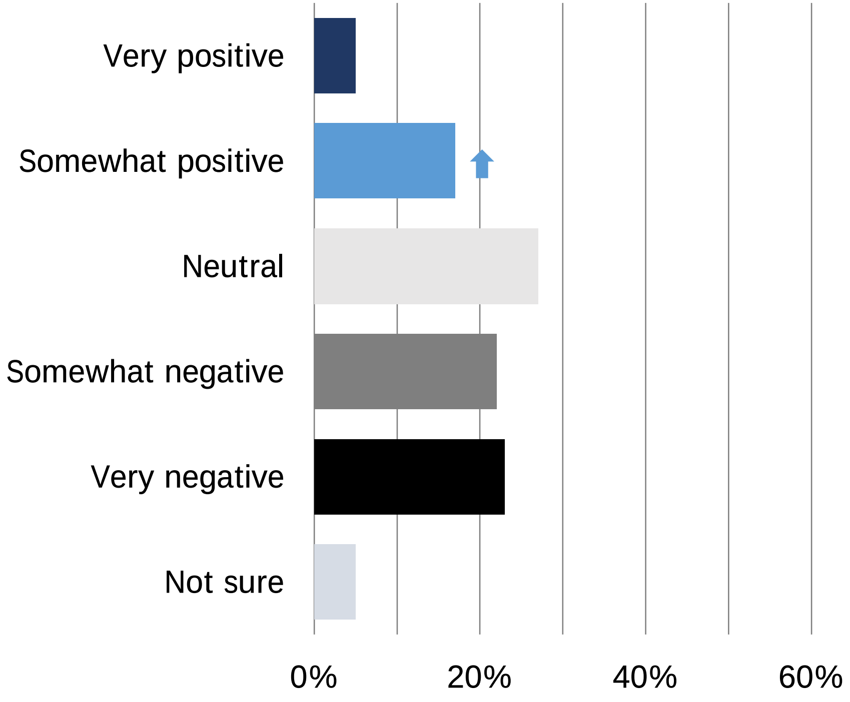


Q39: What is your opinion of 'added' sugars (ex. table sugar or high fructose corn syrup)? (n=1,009)
Q40: Thinking about the past year, how has your opinion changed, if at all, about 'added' sugars (ex. table sugar or high fructose corn syrup)? (n=1,009)

4 in 10 View Low / No-Calorie Sweeteners Negatively

Hispanic/Latino consumers have more positive opinion of low/no-calorie sweeteners

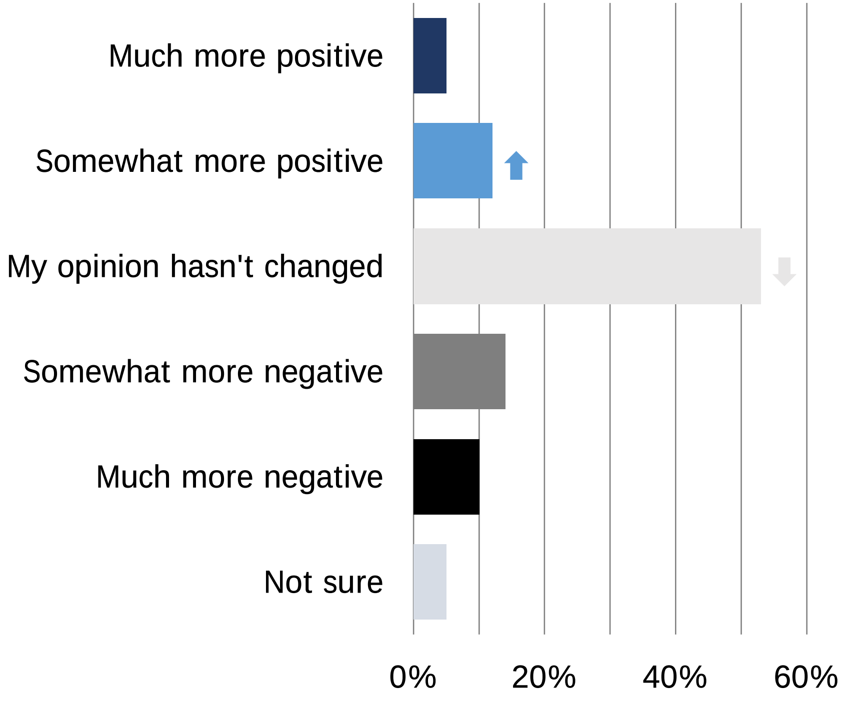
Opinion of Low / No-Calorie Sweeteners



23% Very / Somewhat positive

45% Very / Somewhat negative

Change in Opinion of Low / No-Calorie Sweeteners in the Past Year



17% Much more / Somewhat more positive

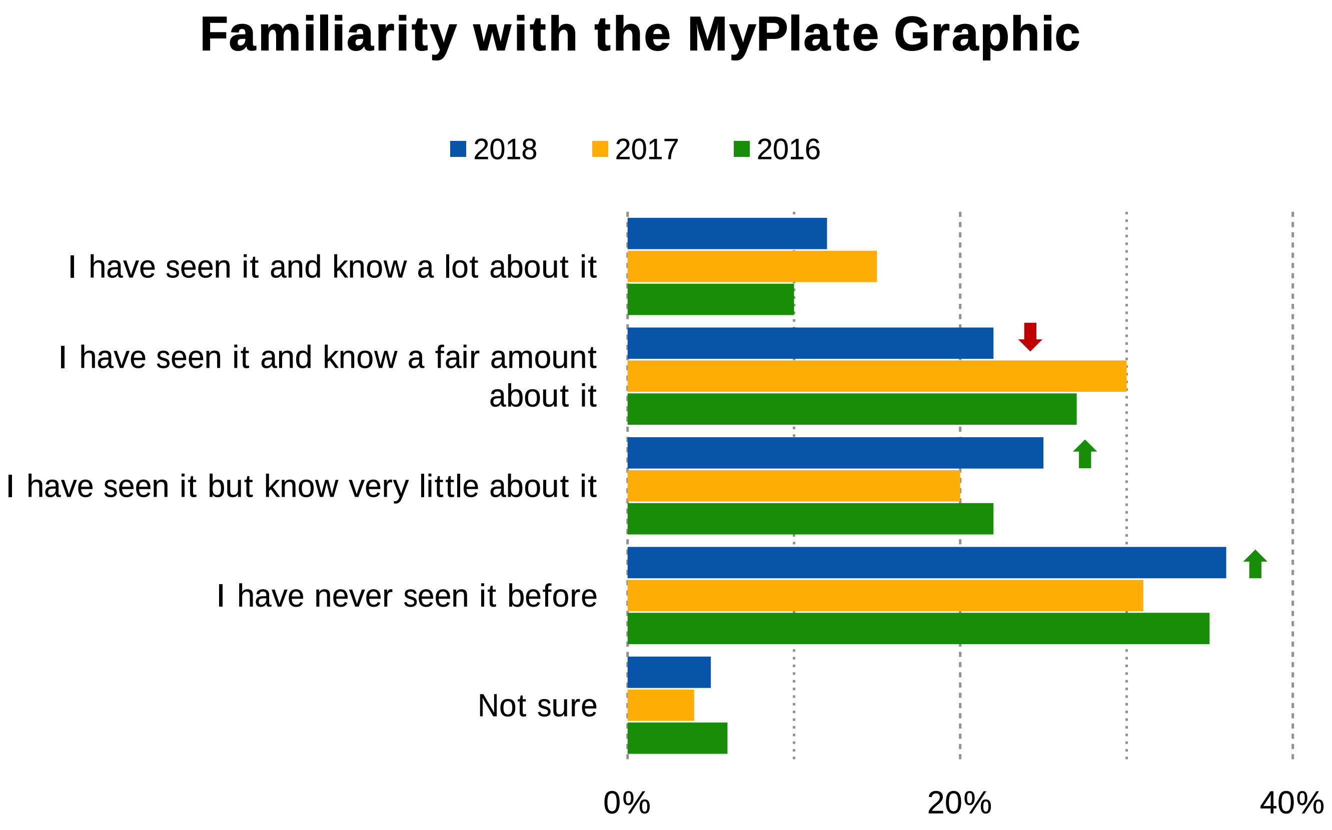
25% Much more / Somewhat more negative

Q41: What is your opinion of low/no-calorie sweeteners? (ex. Sucralose, Aspartame, stevia leaf extract) (n=1,009)
Q42: Thinking about the past year, how has your opinion changed, if at all, about low/no-calorie sweeteners (ex. Sucralose, Aspartame, stevia leaf extract)? (n=1,009)

Eating Behaviors Diverge from MyPlate Recommendations

3 in 10 Know A Lot/Fair Amount About MyPlate

Younger consumers, those in better health, parents and women are particularly familiar with the icon



59%
Have seen the MyPlate graphic

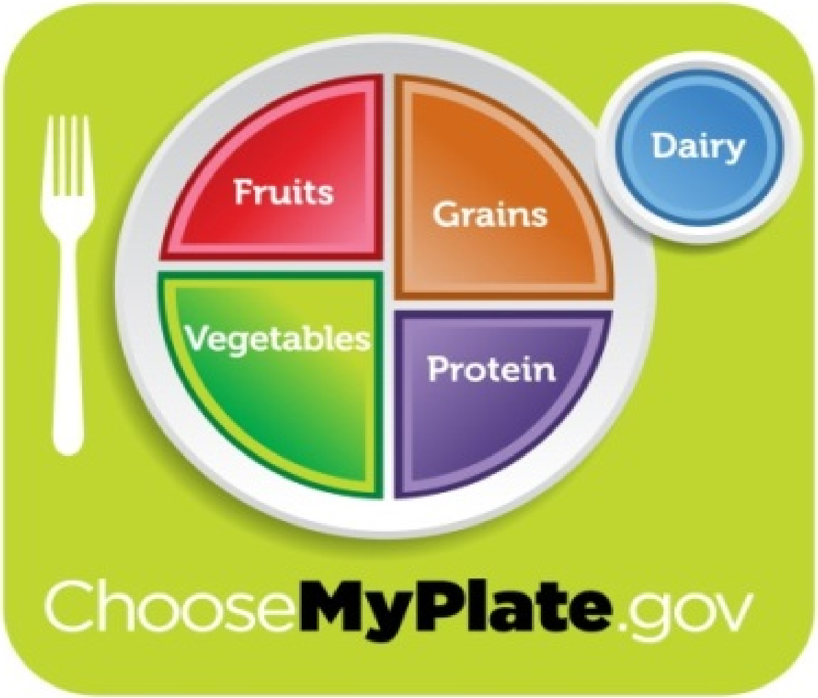
69%
Of parents with children under 18 have seen the MyPlate graphic

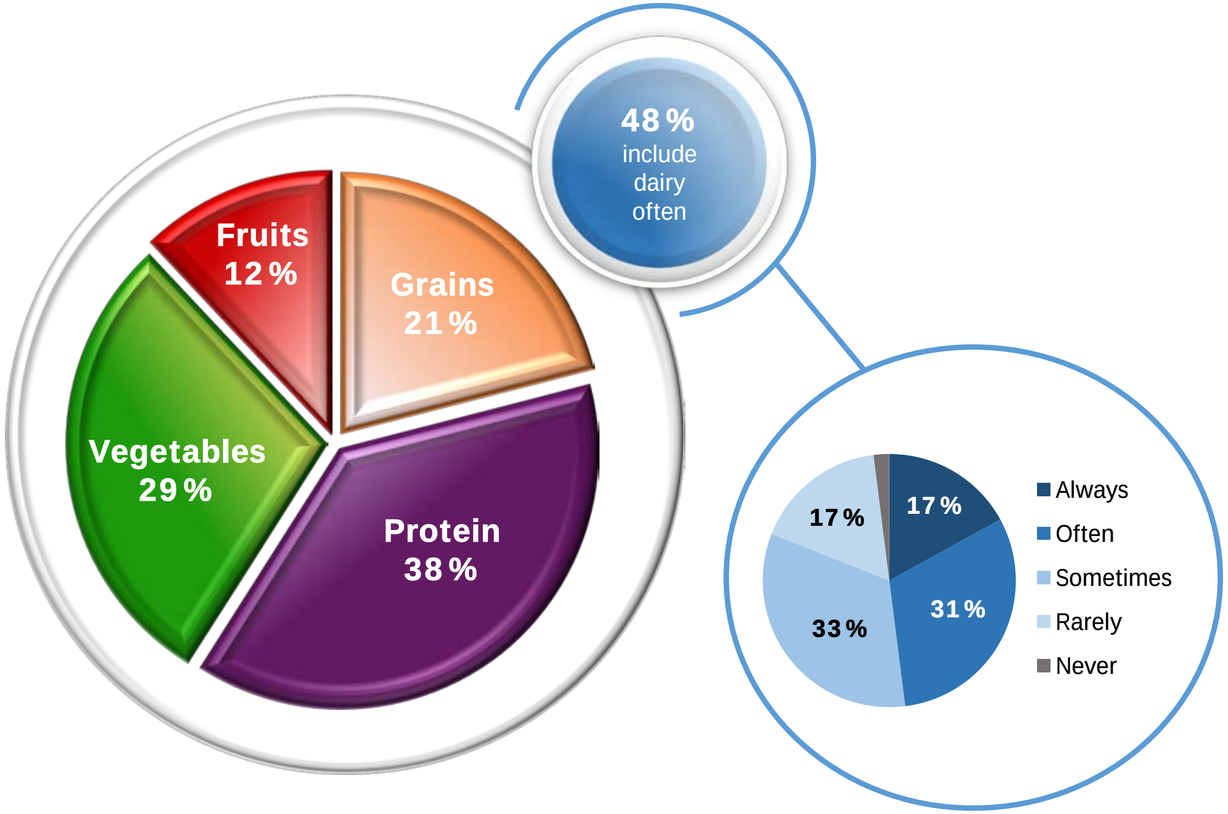
Q6: How familiar are you, if at all, with the following graphic? (n=1,009)

A Typical Dinner Plate is Mismatch to MyPlate

Americans report getting less fruits and vegetables, and more protein, than is recommended by MyPlate

My Plate Vs. What Consumers Say Is On Their Plate



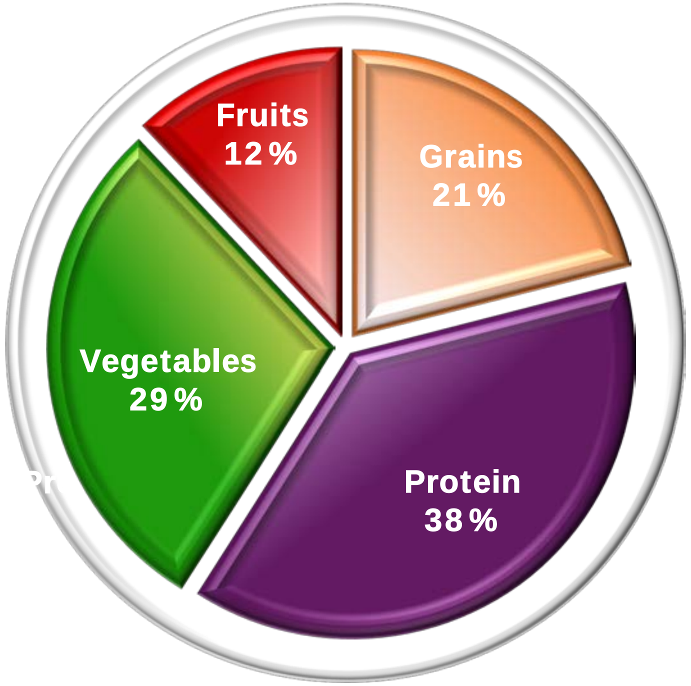


Q2: Thinking about your average dinner, what percentage of your plate would contain each of the following types of food? Please note, your response must total to 100%. (n=1,009)
Q3: Thinking about your average dinner, about how often do you include a serving of dairy (ex: milk, cheese, yogurt, etc.)? (n=1,009)

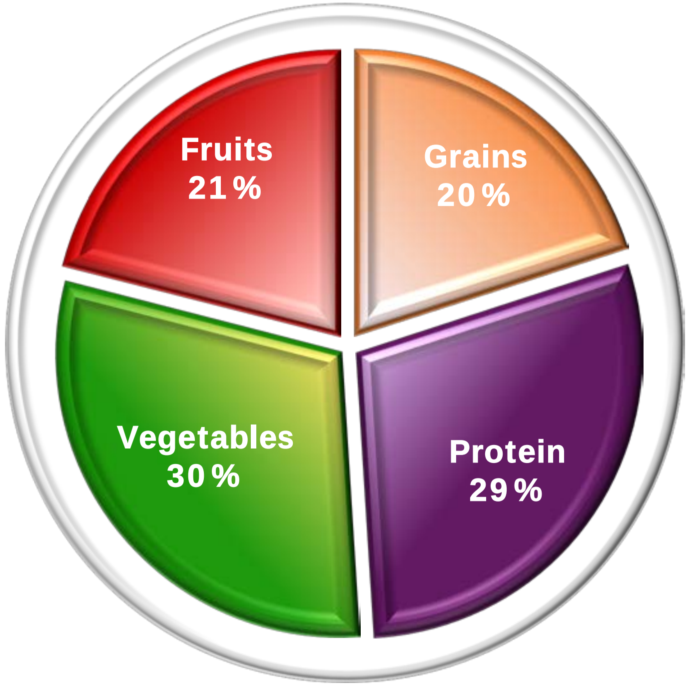
Beliefs about Expert Recommendations

Consumers believe experts recommend a larger portion of fruit and a smaller portion of protein than what they say is actually on their plate

What Consumers Say is On Their Plate



What Consumers Believe Experts Recommend



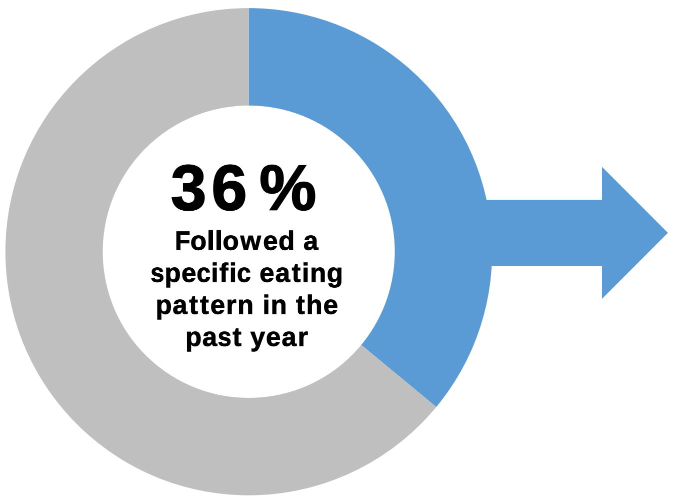
Q2: Thinking about your average dinner, what percentage of your plate would contain each of the following types of food? Please note, your response must total to 100%. (n=1,009)
Q4: What percentage of a healthy adult's plate do you think health experts recommend should contain each of the following types of food? Please note, your response must total to 100% (n=1,009)

One-Third of Consumers Follow an Eating Pattern, but Patterns are Diverse

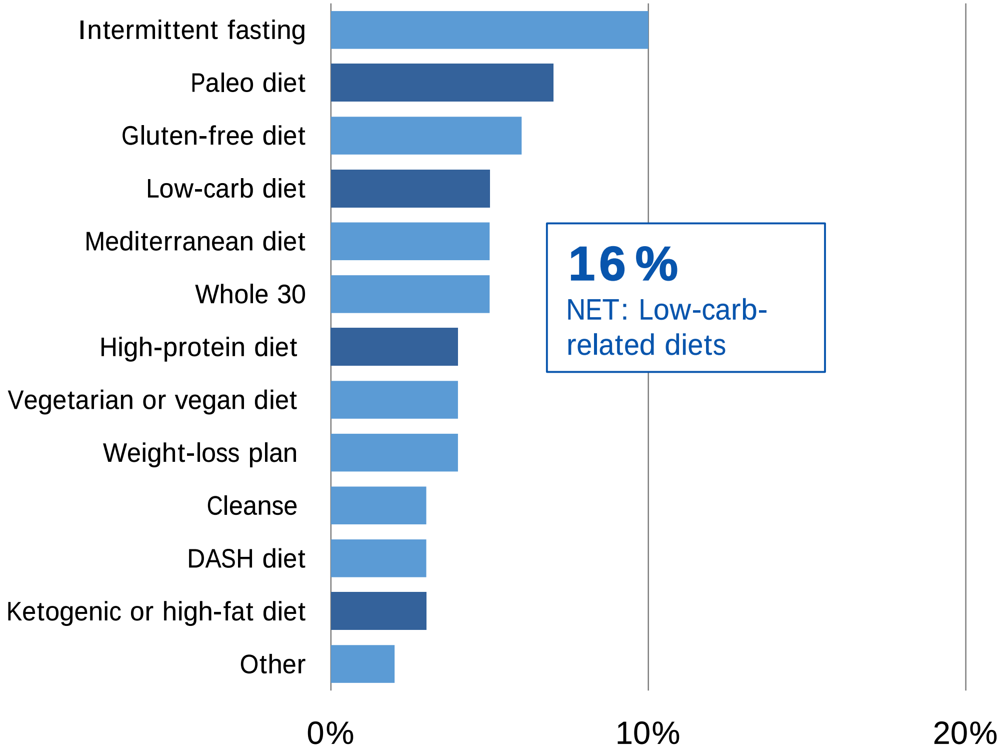
One-Third Follow a Specific Eating Pattern

A higher number of younger consumers (18 to 34) followed a specific eating pattern/diet

Following Specific Eating Pattern



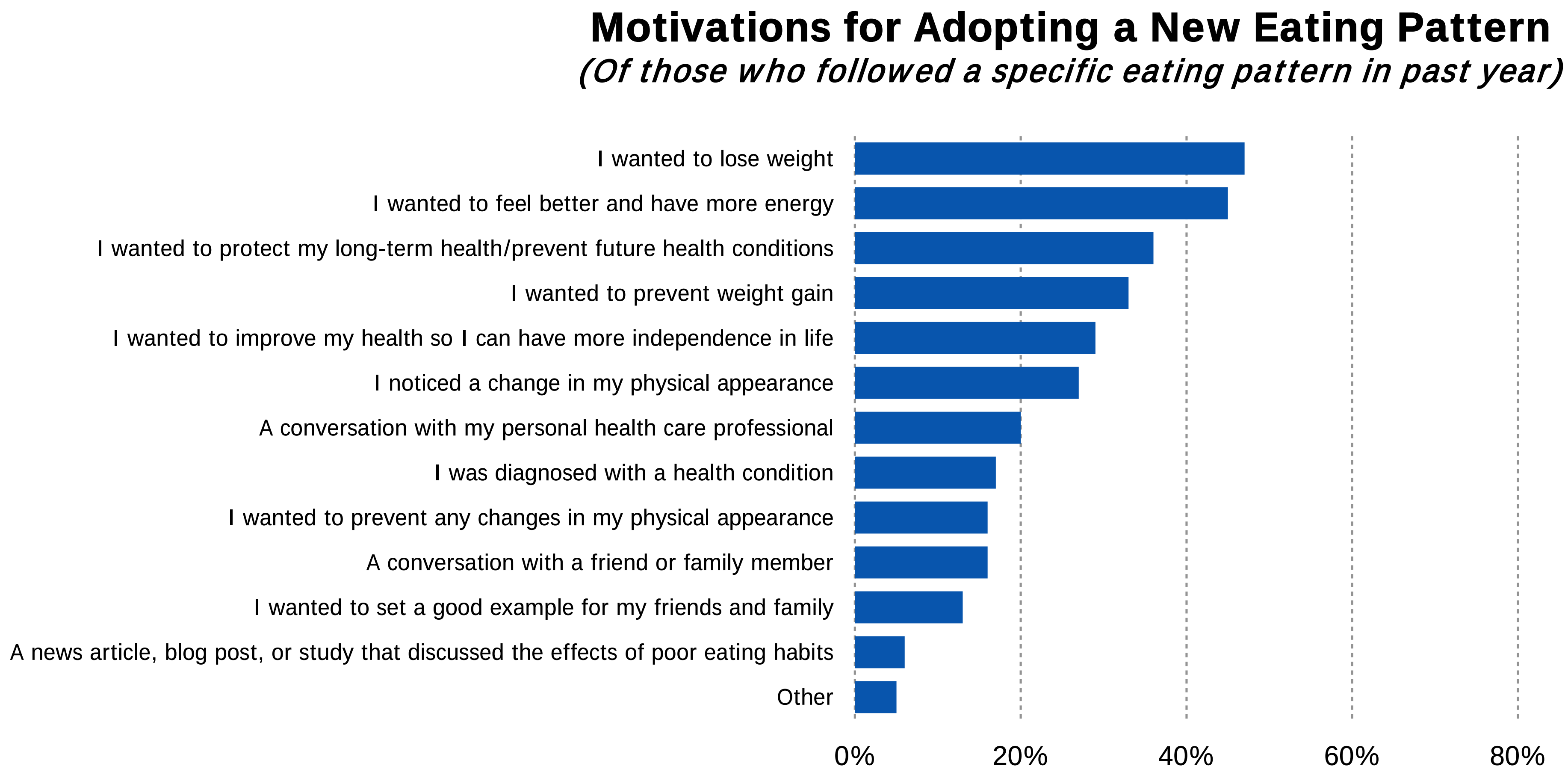
Type of Eating Pattern Followed



Q27: Have you followed any specific eating pattern or diet at any time in the past year? Select all that apply. (n=1,009)

Motivators for Adopting Specific Eating Pattern

Almost half of consumers indicate they adopted a new eating pattern in an effort to lose weight



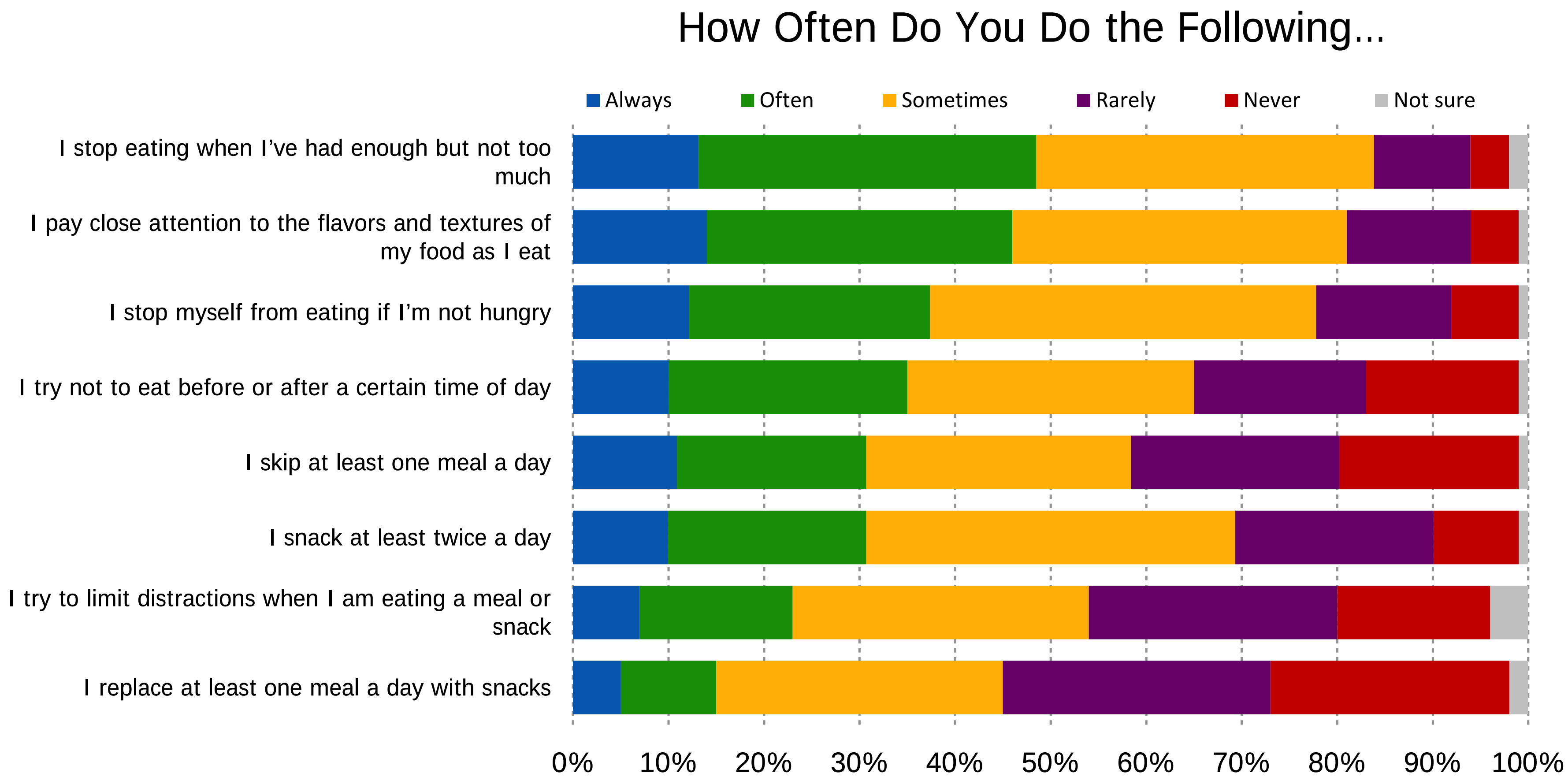
56% Of non-Hispanic whites tried a new eating pattern in order to lose weight

52% Of those age 50-64 and **47%** of those age 65+ followed a new eating pattern in an effort to protect long-term health

Q28: Which of the following motivated you to make an effort to adopt a new eating pattern/diet? Select all that apply. (Of those who followed a specific eating pattern in past year, n=369)

Nearly Half Say They Stop Eating When They've Had Enough

Majority of consumers indicated they sometimes snack at least twice a day



Older adults (65+) are less likely to skip a meal

51%
Of African Americans state they often or always stop themselves from eating when they are not hungry

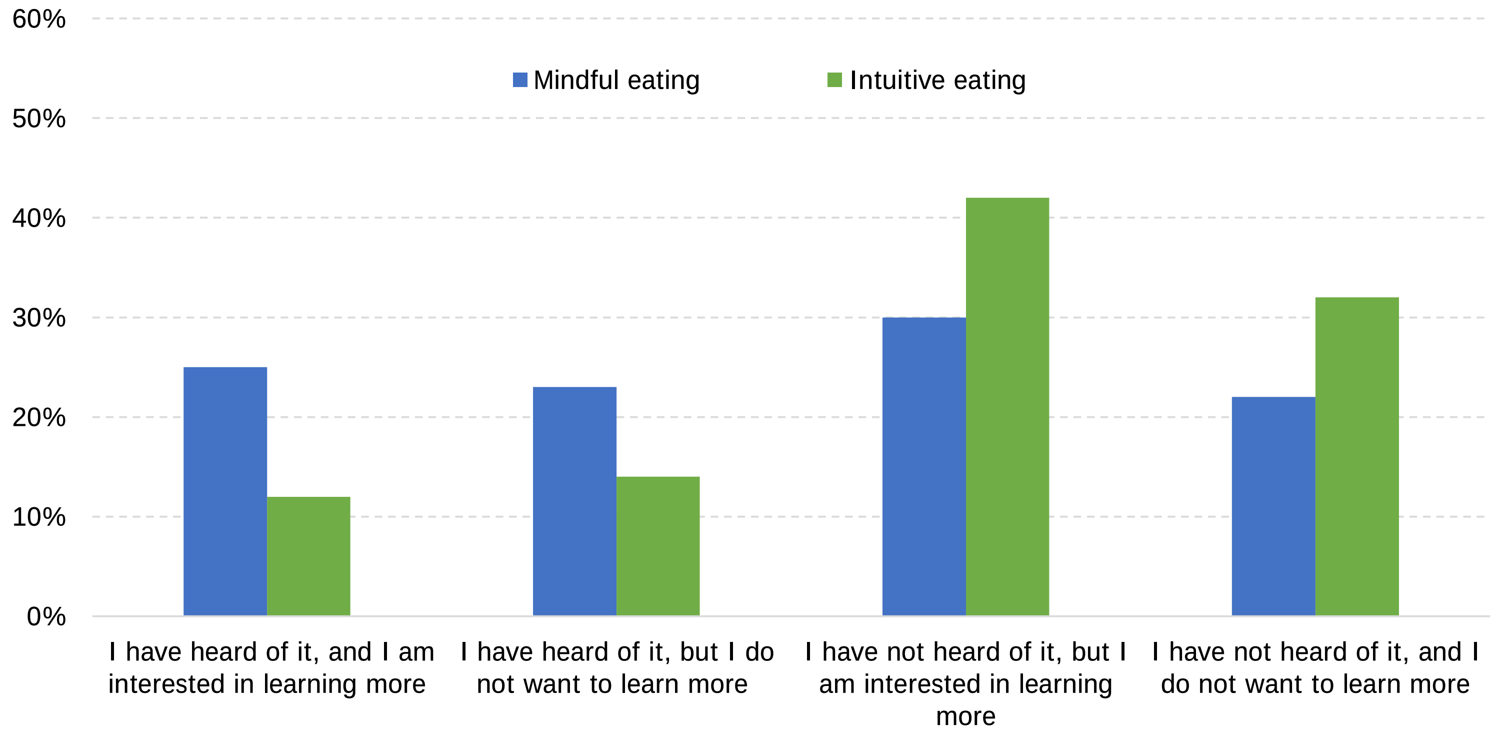
People who **rank food sustainability as very important** indicate they participate in these eating patterns more often

Q25: How often do you do the following? (n=1,009)

Few Familiar With Intuitive Eating

Younger adults have more familiarity with mindful eating and intuitive eating than older adults

Familiarity and Interest in Mindful, Intuitive Eating



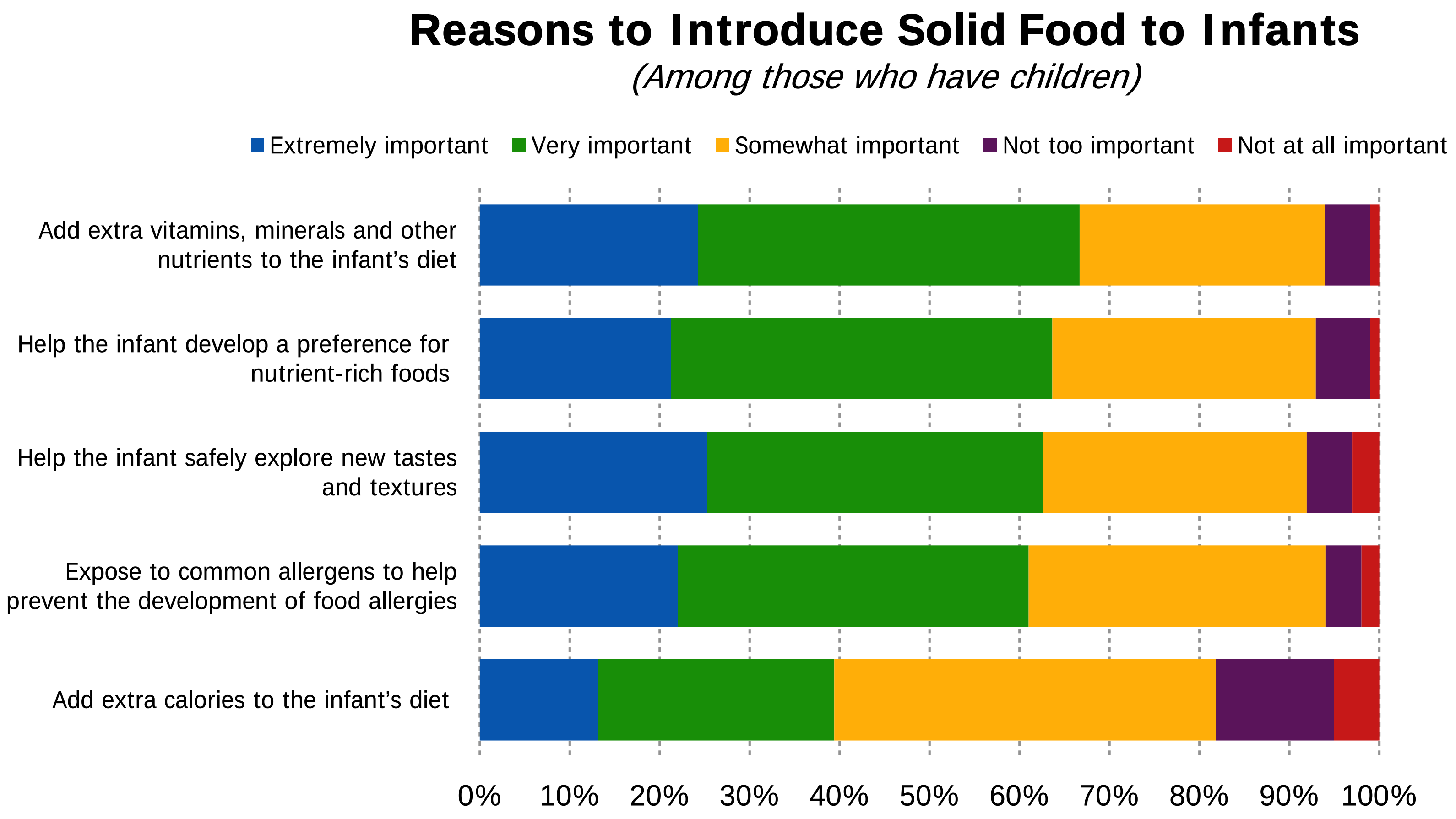
Mindful eating
NET familiarity: 47%
NET interest: 55%

Intuitive eating
NET familiarity: 26%
NET interest: 55%

Q26: Which of the following best describes your familiarity and interest in the practice of "mindful eating"? (Split Sample A, n=506)
Q26b: Which of the following best describes your familiarity and interest in the practice of "intuitive eating"? (Split Sample B, n=503)

Parents Introduce Solid Foods for Many Reasons

Consumers see each reason for introducing solid food as important, in some cases very/extremely important

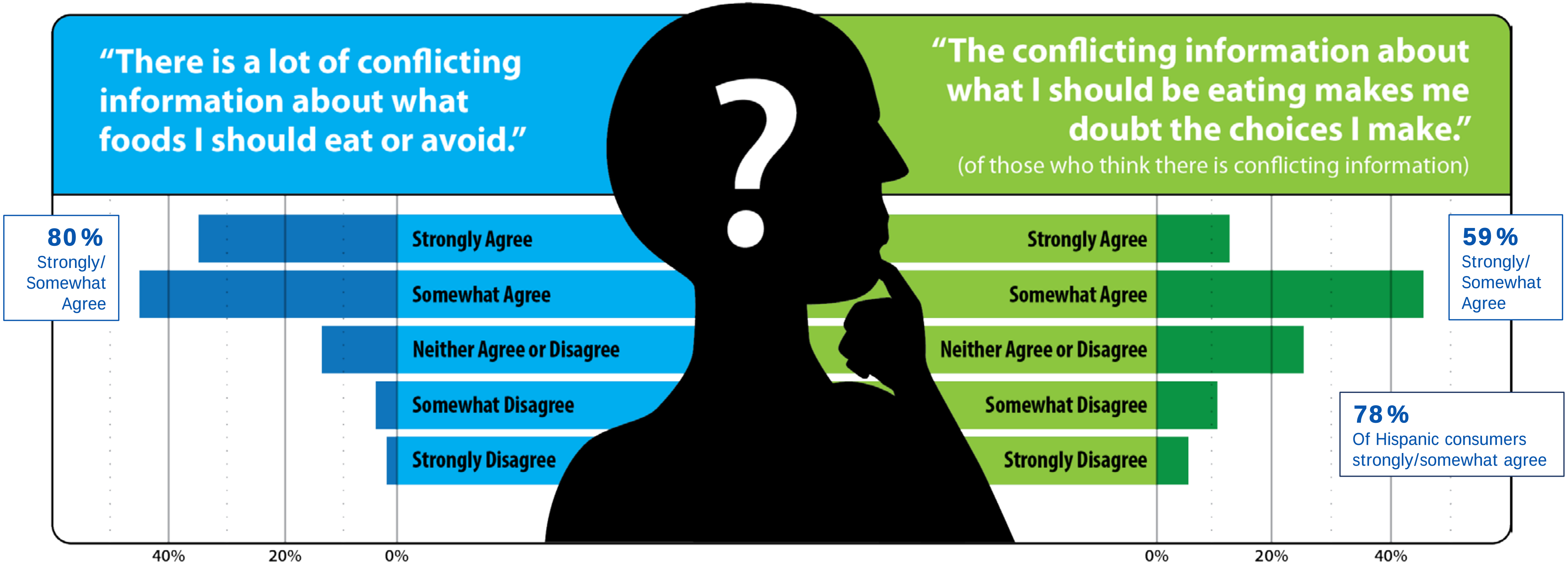


Consumers between the ages of 35 and 49 generally view each reason as very/extremely important, compared to those consumers age 65+

Q29: Experts recommend that parents and caregivers begin introducing solid food to infants around the age of 6 months. How important are the following reasons for introducing solid foods? (Of those who have children, n=637)

Consumers Rely on a Multitude of Information Sources, Some of Which They Trust

Conflicting Information Creates “Confusion”

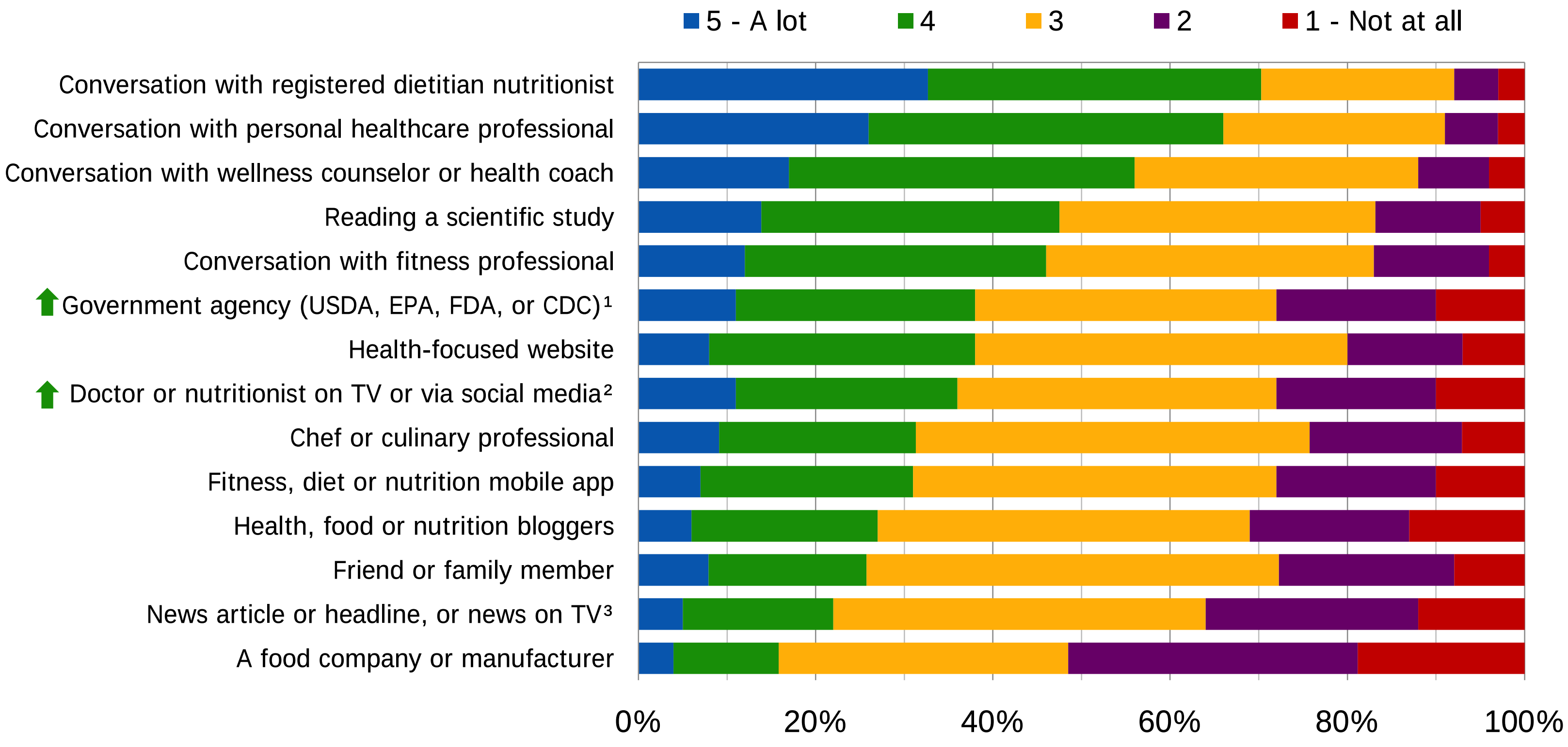


Q8: Do you agree or disagree with the following statement? “There is a lot of conflicting information about what foods I should eat or avoid.” (n=1,009)
Q9: Do you agree or disagree with the following statement? “The conflicting information about what I should be eating makes me doubt the choices I make.” (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



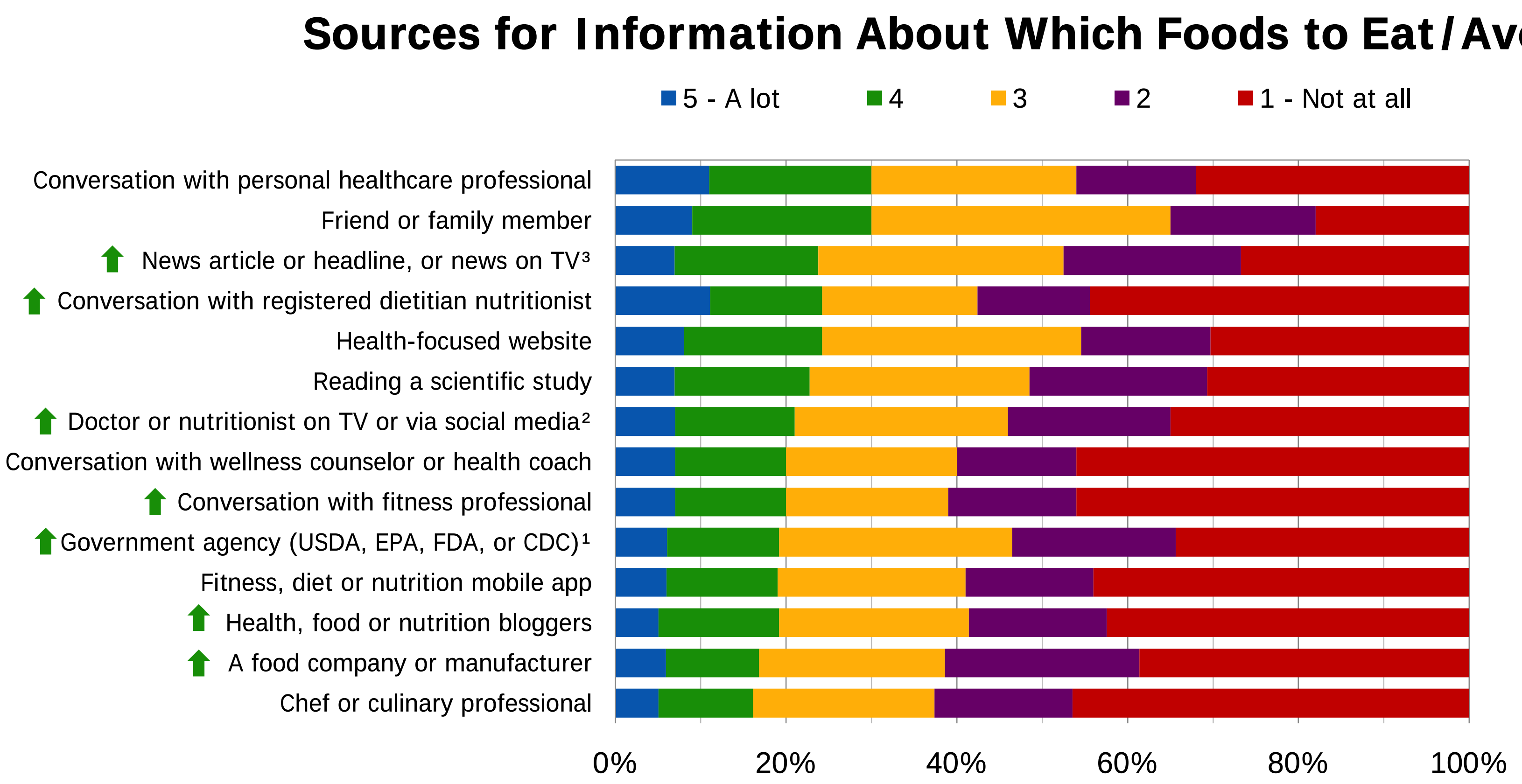
76%
Of older Americans (those 65+) trust a registered dietitian, compared to **65%** of younger adults (<35 years old)

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)
[1] In 2017, this item did not include the examples in parentheses
[2] In 2017, this item was phrased as "Healthcare professional on TV or via social media"
[3] 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

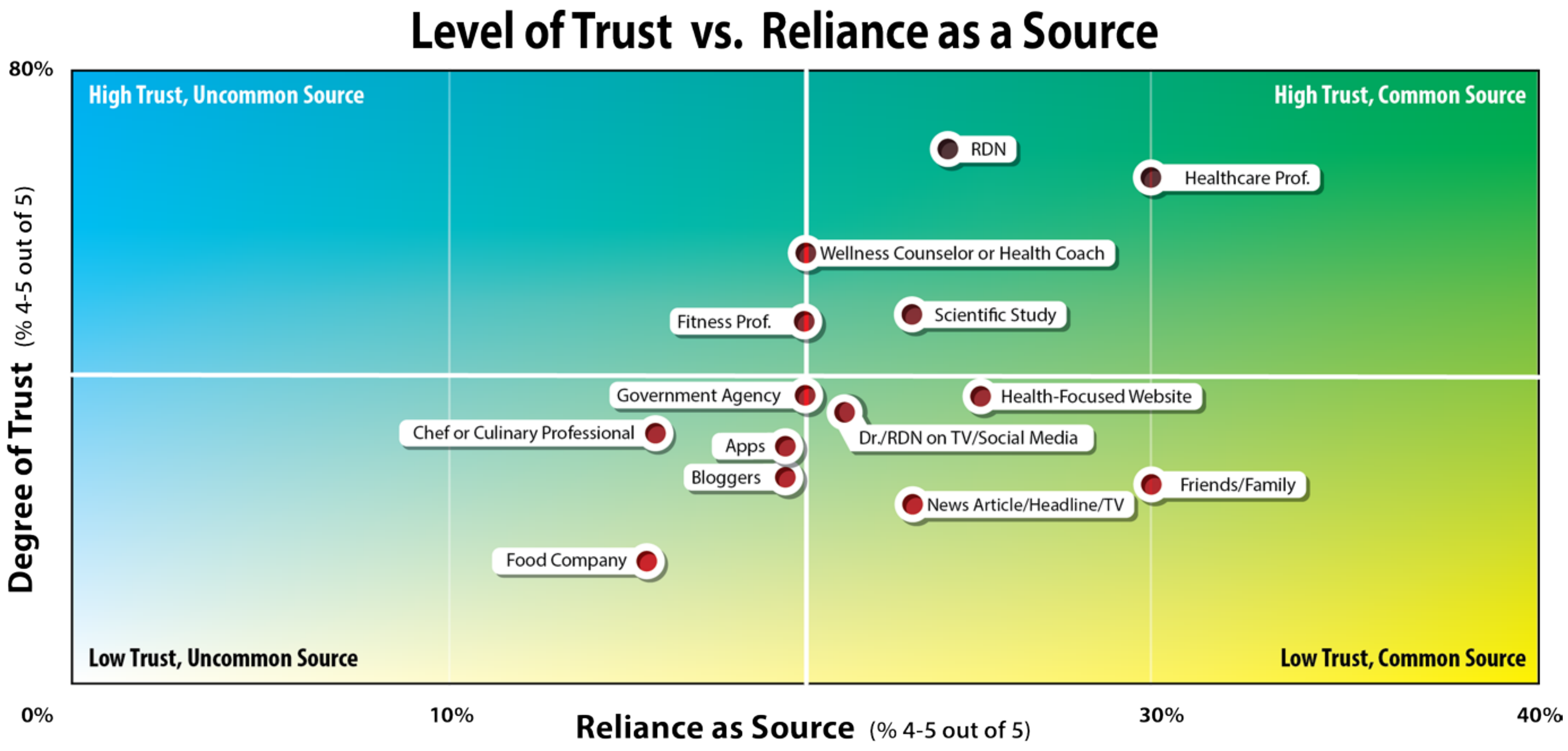


Consumers at a **lower BMI** are more likely to listen to friends, personal healthcare professional and health coaches

Q11: How often do you get information from the following on which foods to eat and avoid? (n=1,009)
[1] In 2017, this item did not include the examples in parentheses
[2] In 2017, this item was phrased as "Healthcare professional on TV or via social media"
[3] In 2017, this item was phrased as "News Article or Headline"

Relationship Between Trust and Reliance

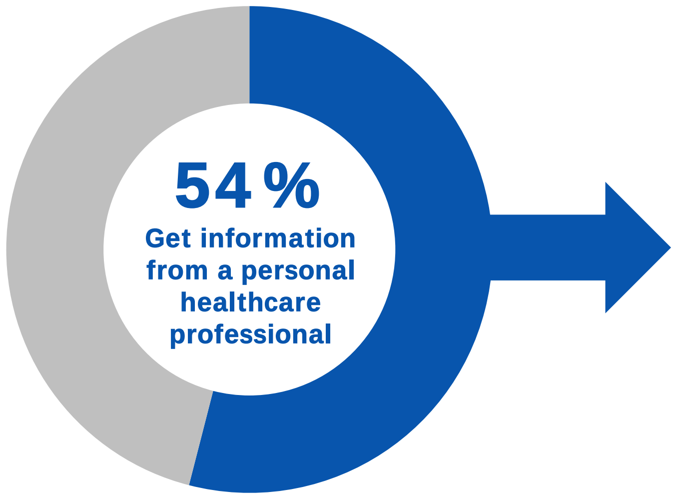
Health professionals trusted and used by consumers to guide health and food decisions



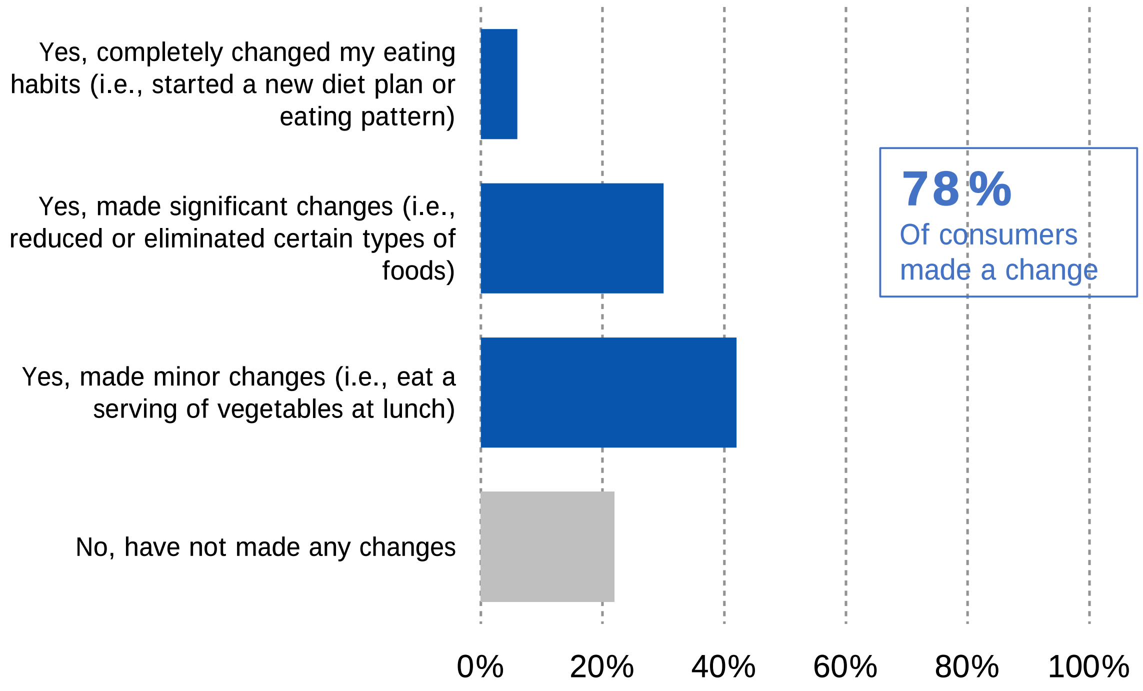
Healthcare Professionals Impact Eating Habits

Most consumers indicate they made a change to eating habits as a result of a conversation with healthcare professional

Getting Information From Personal Healthcare Professional



Changed Eating Habits as Result of Conversation



Q11: How often do you get information from the following on which foods to eat and avoid? (n=1,009)
Q12: Have you changed your eating habits as a result of a conversation with a personal healthcare professional? (If has conversation with Personal Healthcare Professional 3-5, n=541)

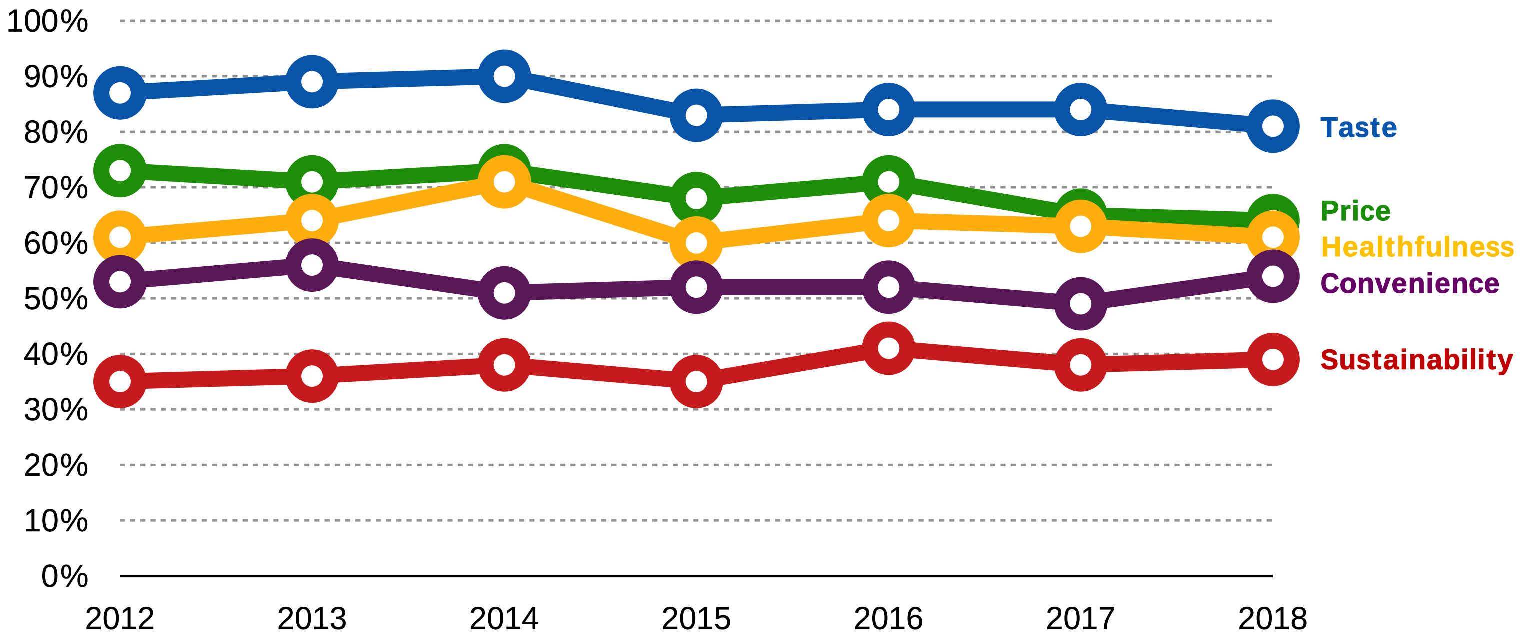
Range of Food Attributes Impact Food Choice

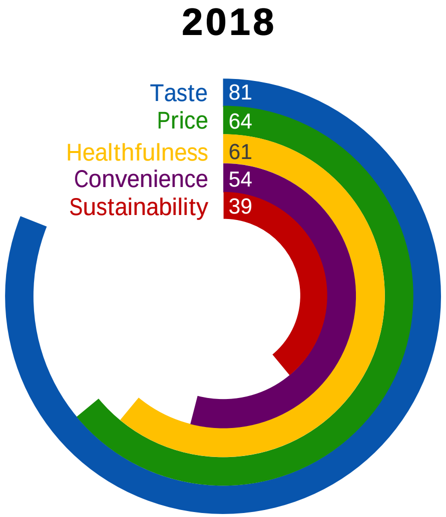
Taste and Price Remain Top Drivers

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)

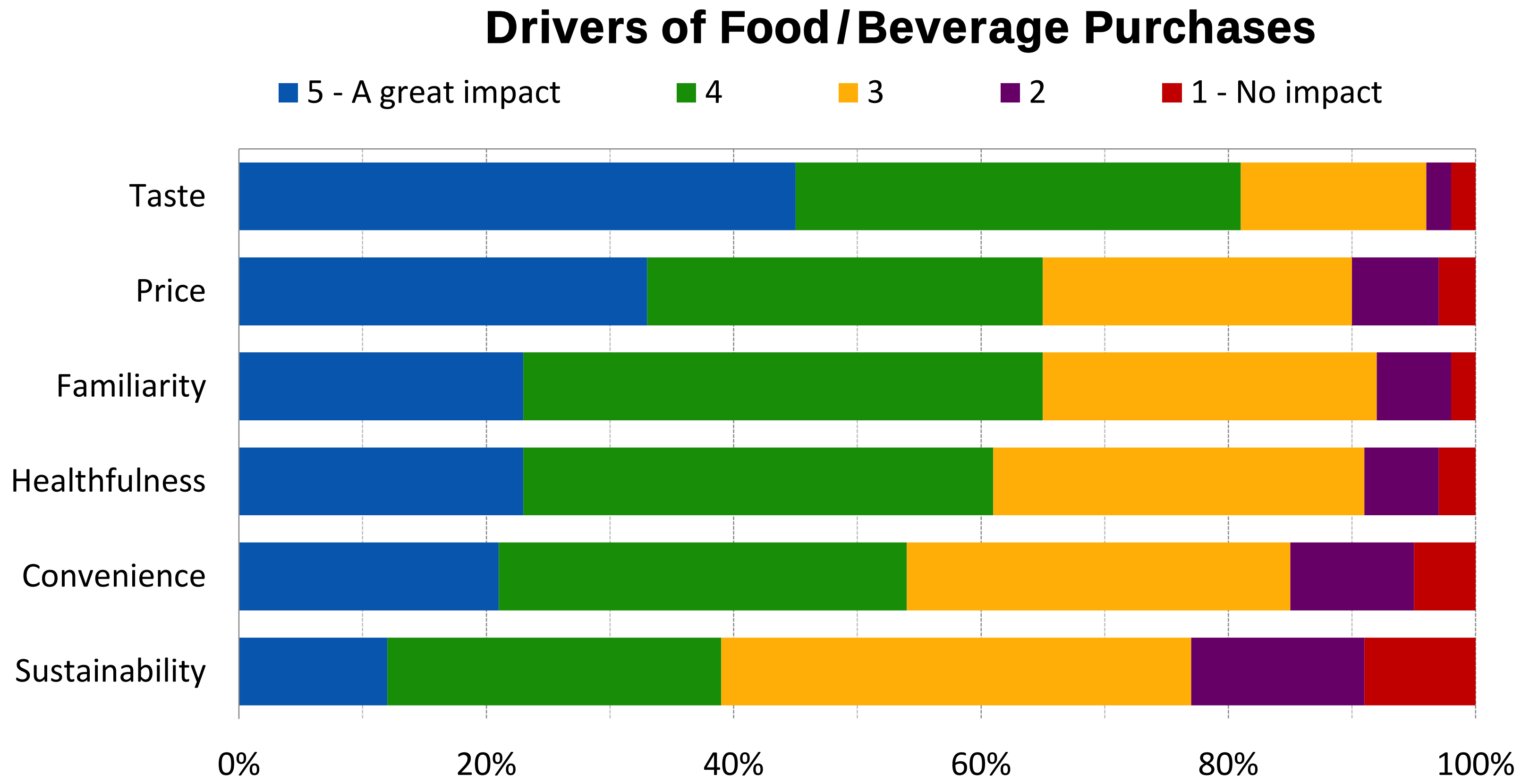




Q13: How much of an impact do the following have on your decision to buy foods and beverages? (n=1,009)

Familiarity is an Important Purchase Driver

Key drivers, like taste, remain unchanged from 2017



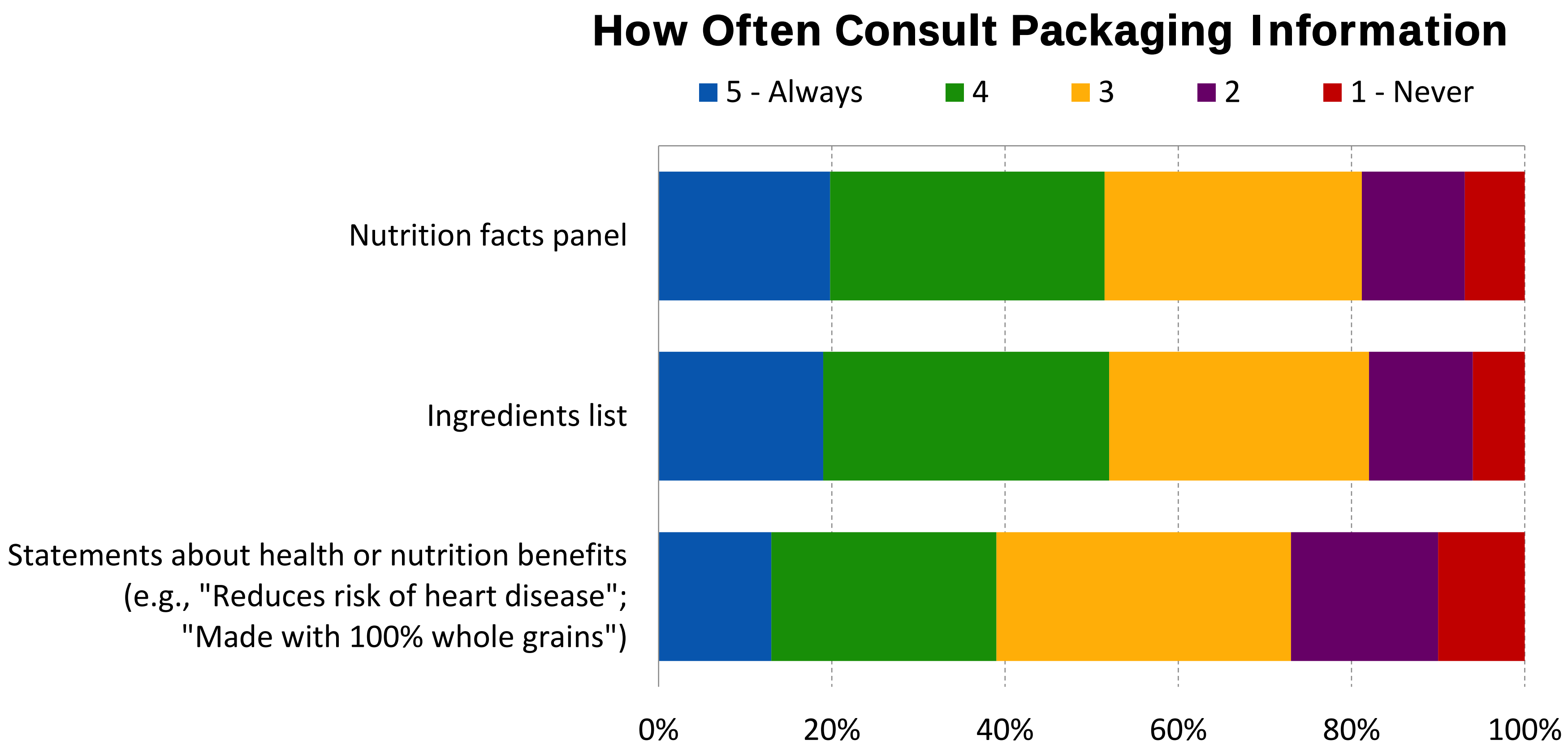
57%
Of those under 35 say familiarity is a top driver vs. roughly 7 in 10 older consumers.

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)

NFP and Ingredients List Equally Consulted

Over half of consumers look at nutrition facts panel or ingredient list often or always when making a purchasing decision



All three packaging information types were viewed most by:

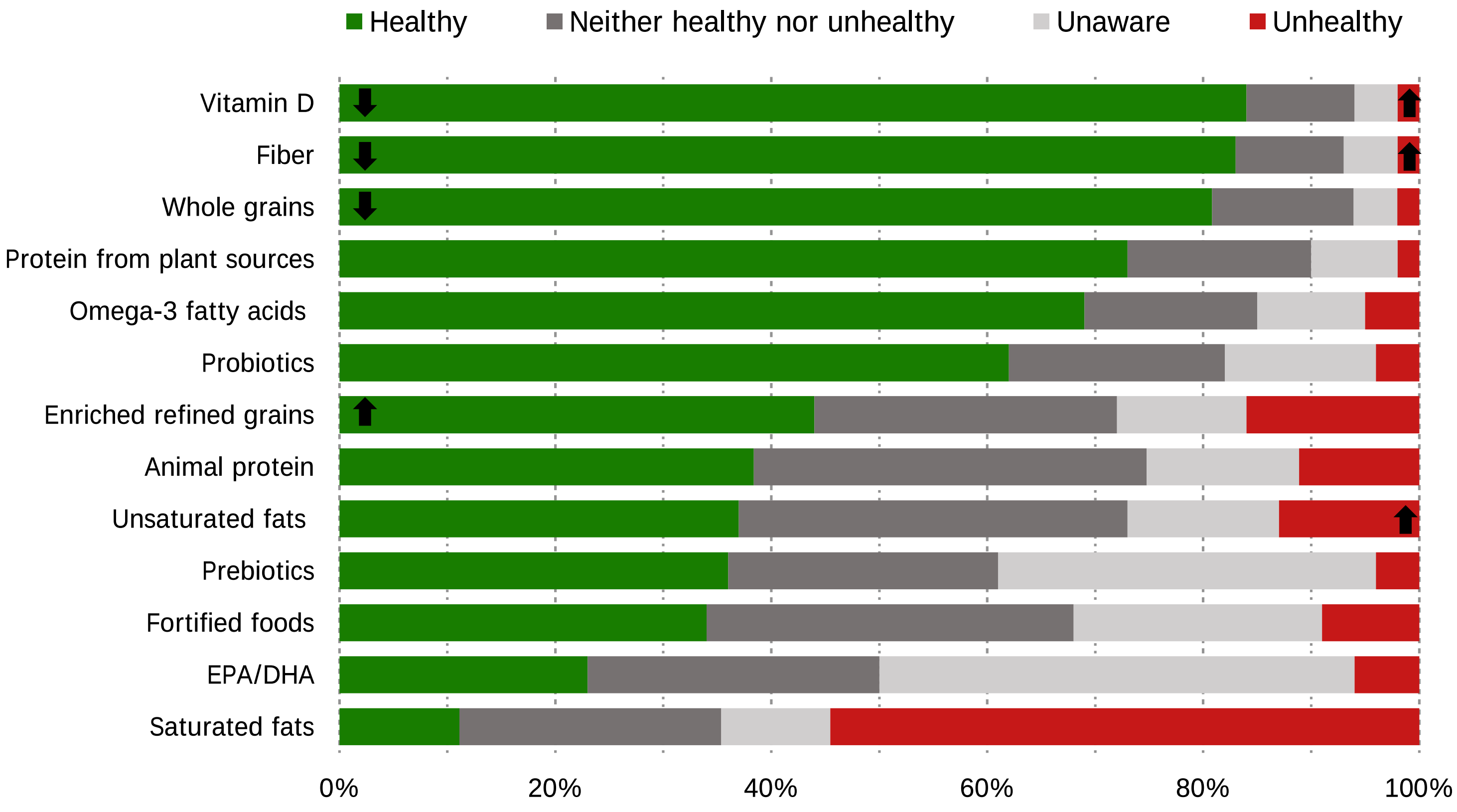
- Those in excellent/very good health
- Those who say sustainability is very important

Q15: How often do you consult the following packaging information before deciding to purchase a food or beverage? (n=1,009)

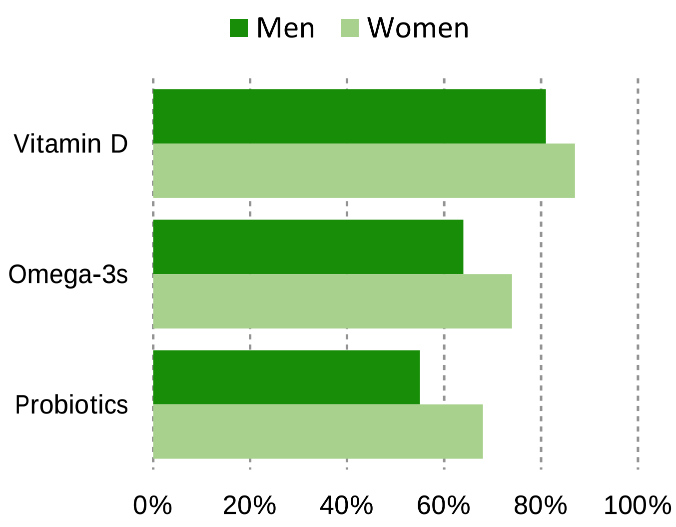
Consumers See Many Nutrients As Healthy

Vitamin D, fiber and whole grains ranked healthy by at least 80% of consumers

Perceived Healthfulness of Foods



% Healthy by Gender

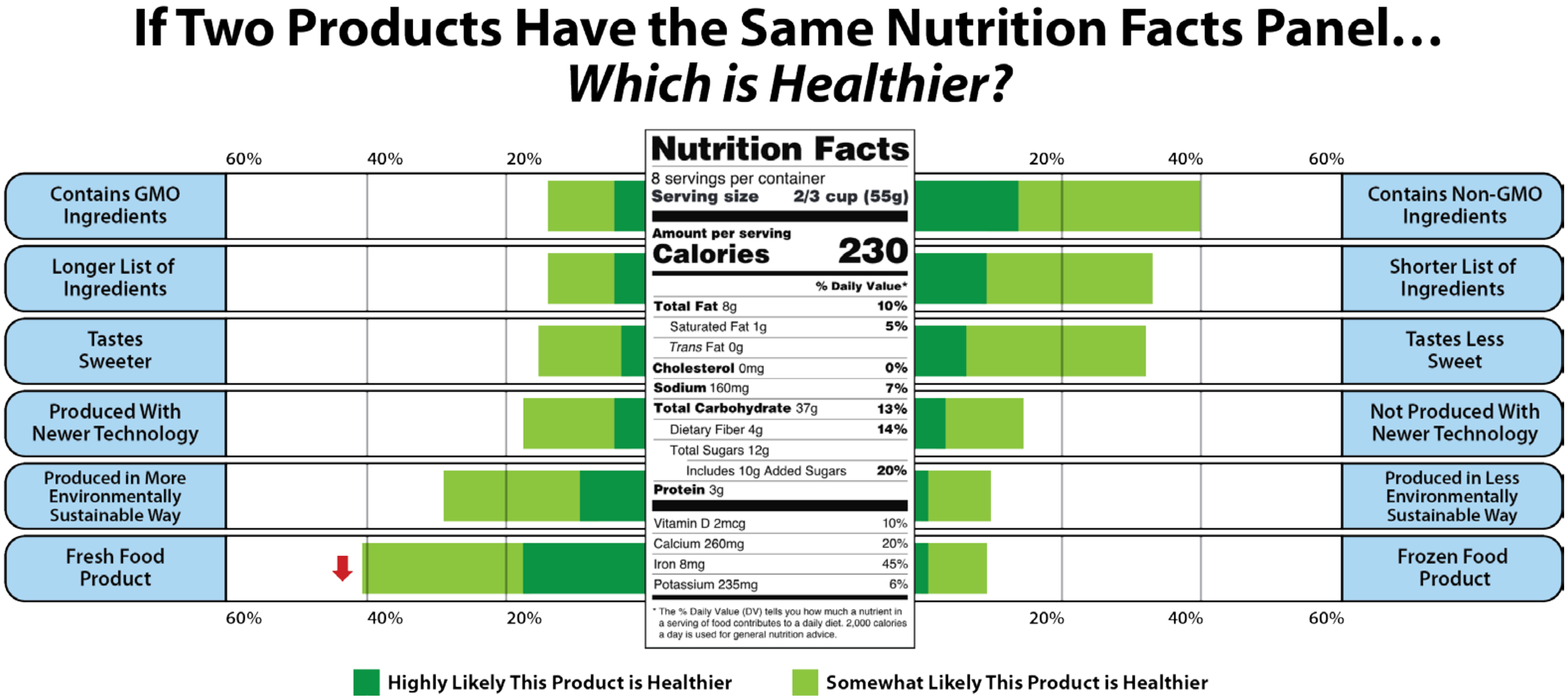


Q30: How would you rate the healthfulness of each of the following? (n=1,009)

Consumers Evaluate Foods Based on Personal Beliefs and Values

How Context Influences the Consumer

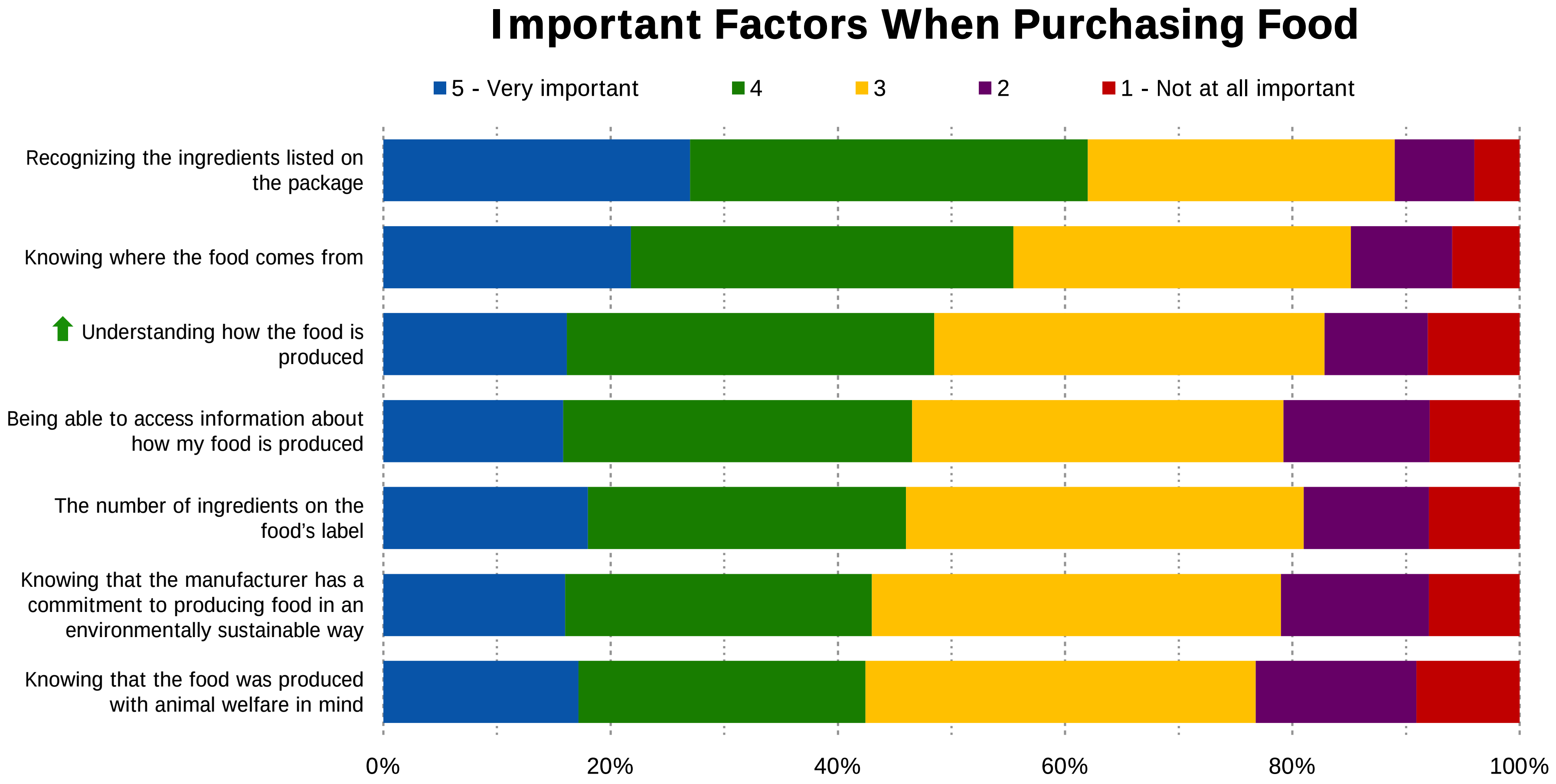
Despite identical nutritional info, GMOs, longer ingredients lists, sustainable production and freshness influence perception



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



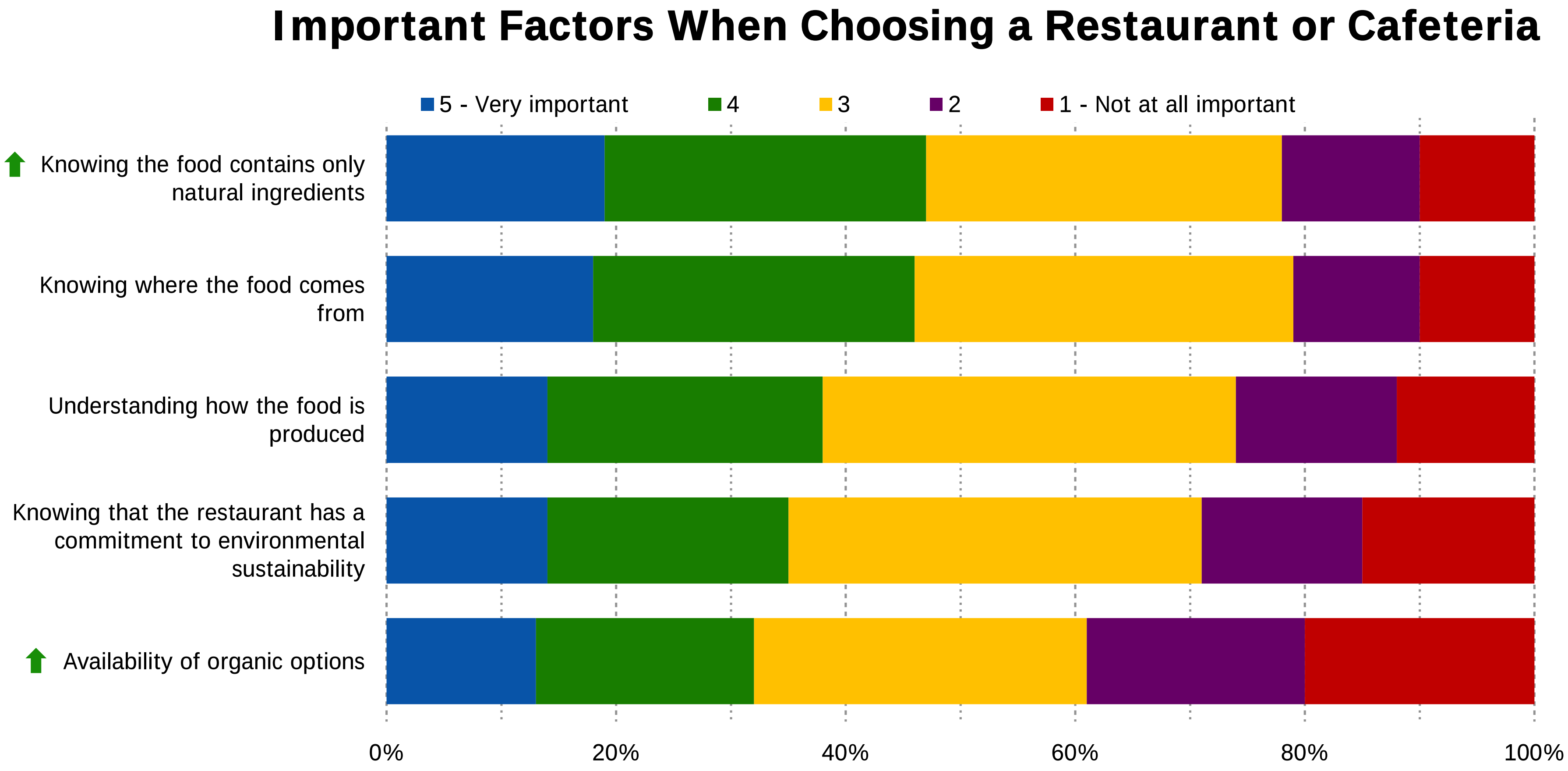
A higher percentage of **women** rate almost all factors as important, compared to men

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)

Knowing Food Sources Key to Restaurant Choice

Food sources and production are top 2 important factors when selecting a restaurant



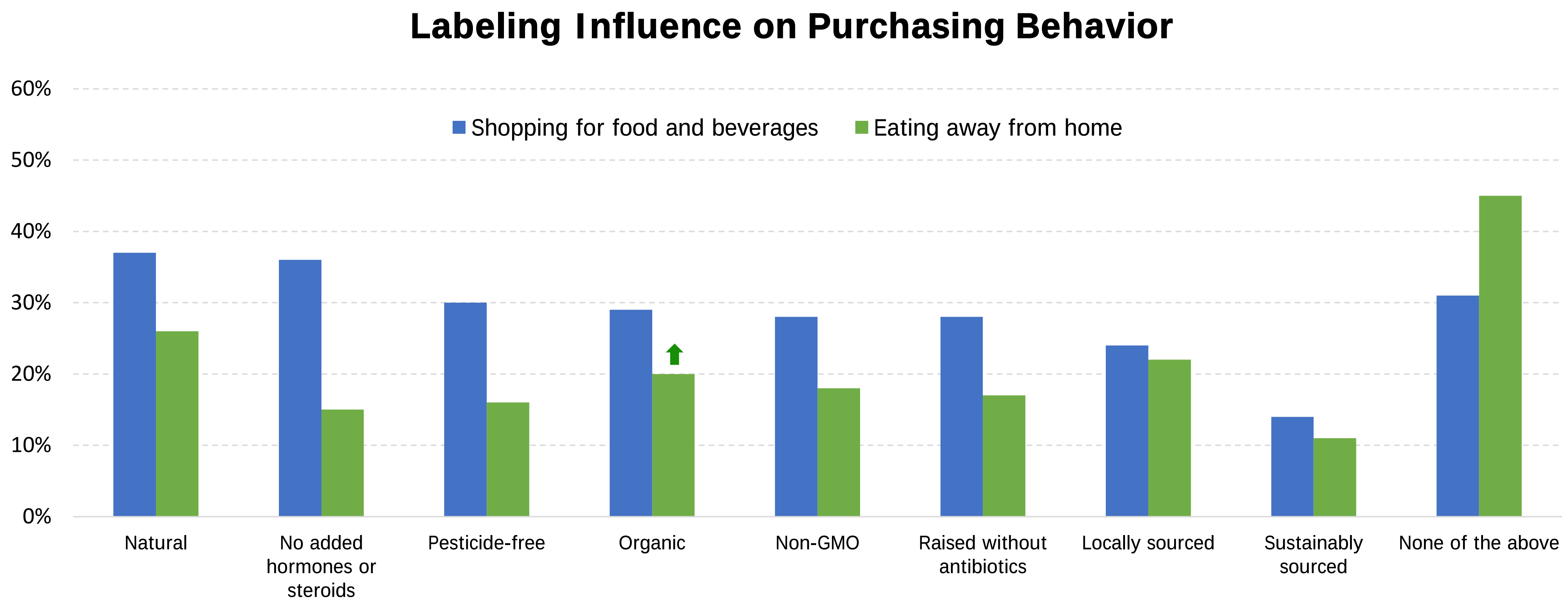
19%
Of those 65+ rank availability of organic food options as a 4/5 on a 5 point scale

66%
Of Hispanics rank knowing food contains only natural ingredients as very important/important

Q44: How important are the following factors when it comes to choosing a restaurant or cafeteria? (Split Sample B, n=504)

Natural, No Added Hormones Important Labels

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

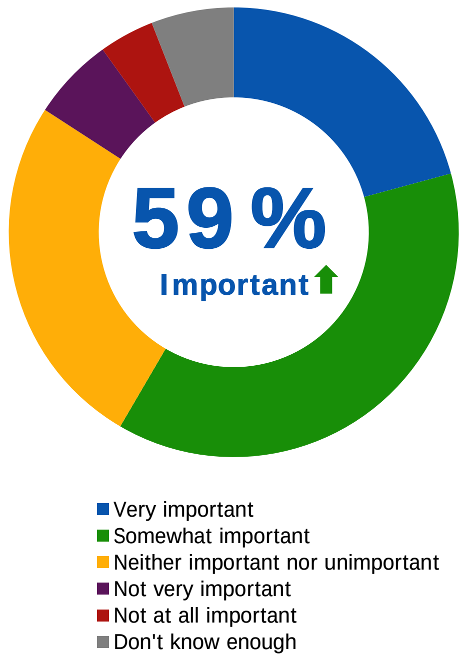


Q47a: Which of the following, if any, do you do on a regular basis (that is, most times when you shop for foods and beverages)? Buy foods and beverages because they are advertised on the label as...? Select all that apply. (Split Sample A, n=505)
Q47b: Which of the following, if any, do you do on a regular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

Majority Say Sustainability of Food Important

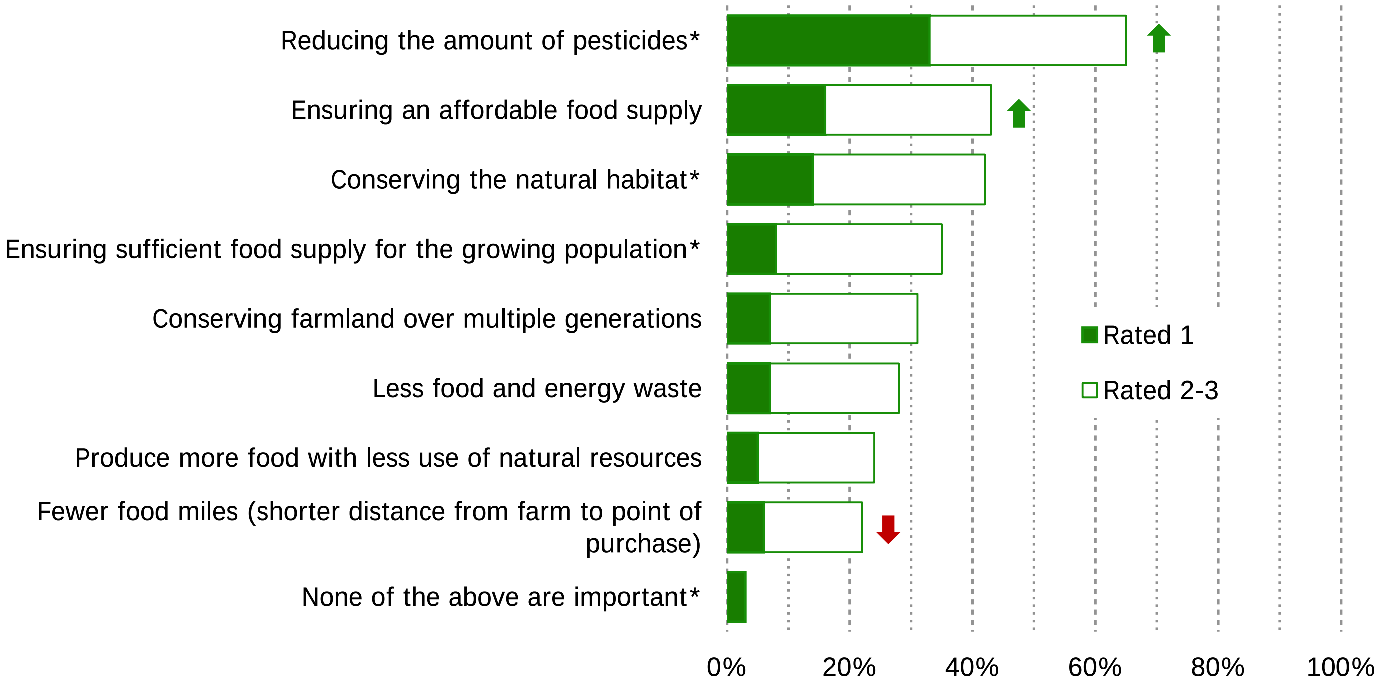
Sustainability for consumers means reducing pesticides, an affordable food supply and conserving natural habitats

Importance of Sustainability in Food Products Purchased



Ranked Important Aspects of Sustainable Food Production

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



Q45: How important is it to you that the food products you purchase or consume are produced in a sustainable way? (n=1,009)
Q46: What 3 aspects of producing food in a sustainable way are most important to you? (Select top answer.) (Of those who say it's important their food be produced sustainably, n=583)
**Response text has been abridged*

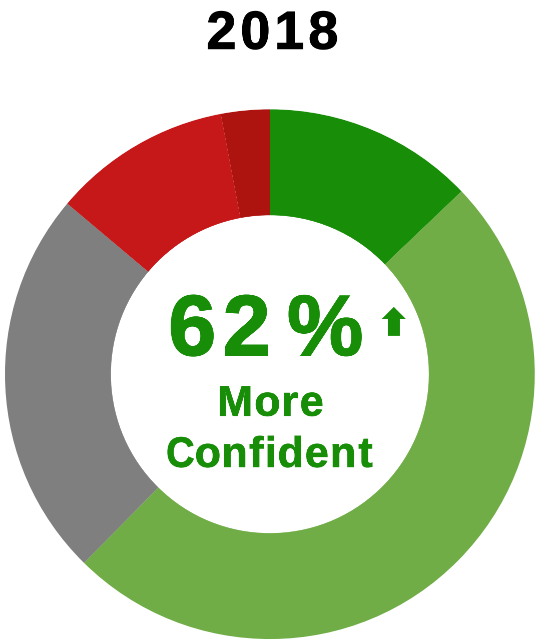
Confidence Grows After FDA Regulation

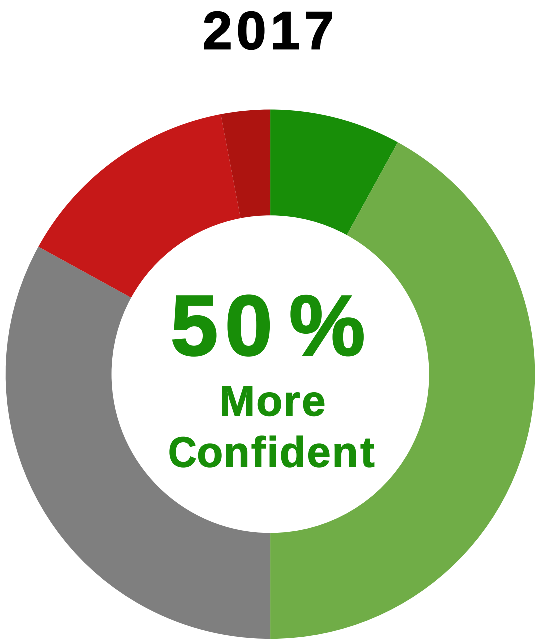
Since last year, more consumers have confidence in the meat, poultry and egg products on the market; those who value sustainability highly are especially likely to be more confident

Change in Confidence Since Prohibition of Antibiotics for Growth Purposes

The US Food and Drug Administration recently prohibited growth-promotion uses of antibiotics and now only allows antibiotics to fight illness in animals producing food. How does this change impact your level of confidence in purchasing meat, poultry, egg, and milk products?

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

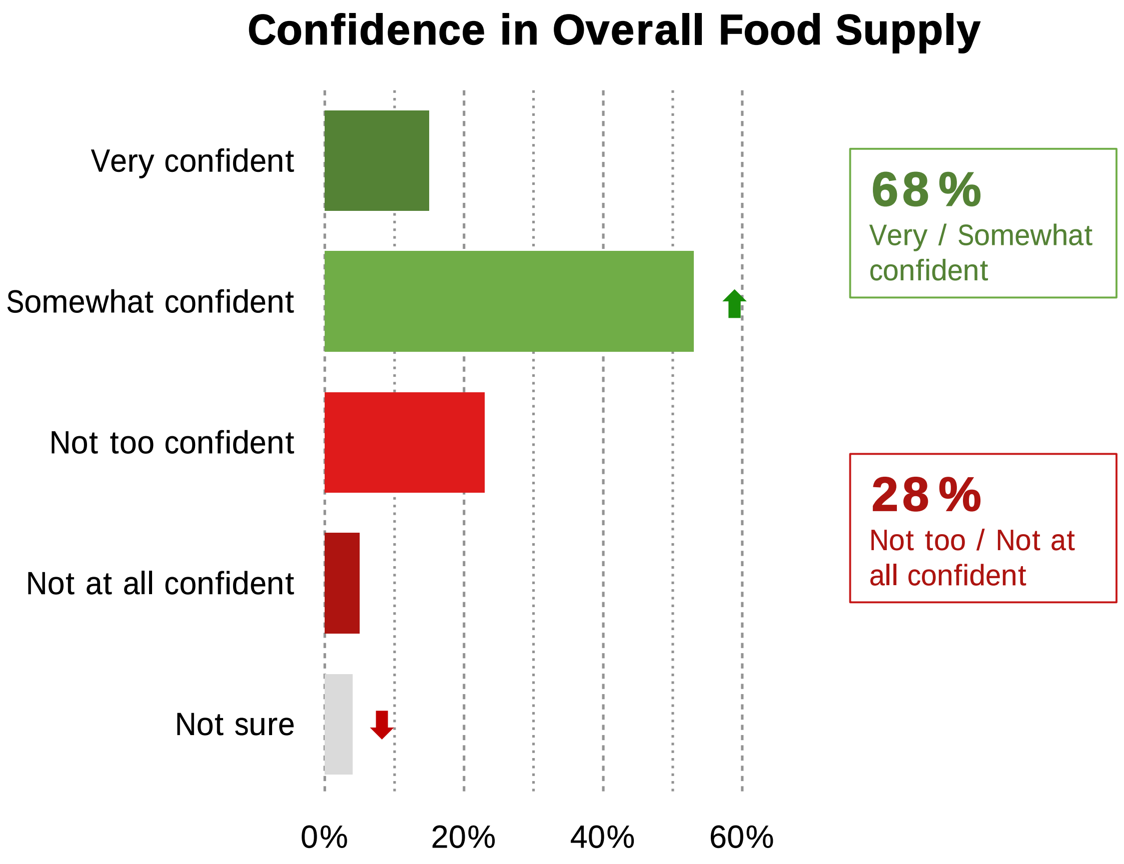


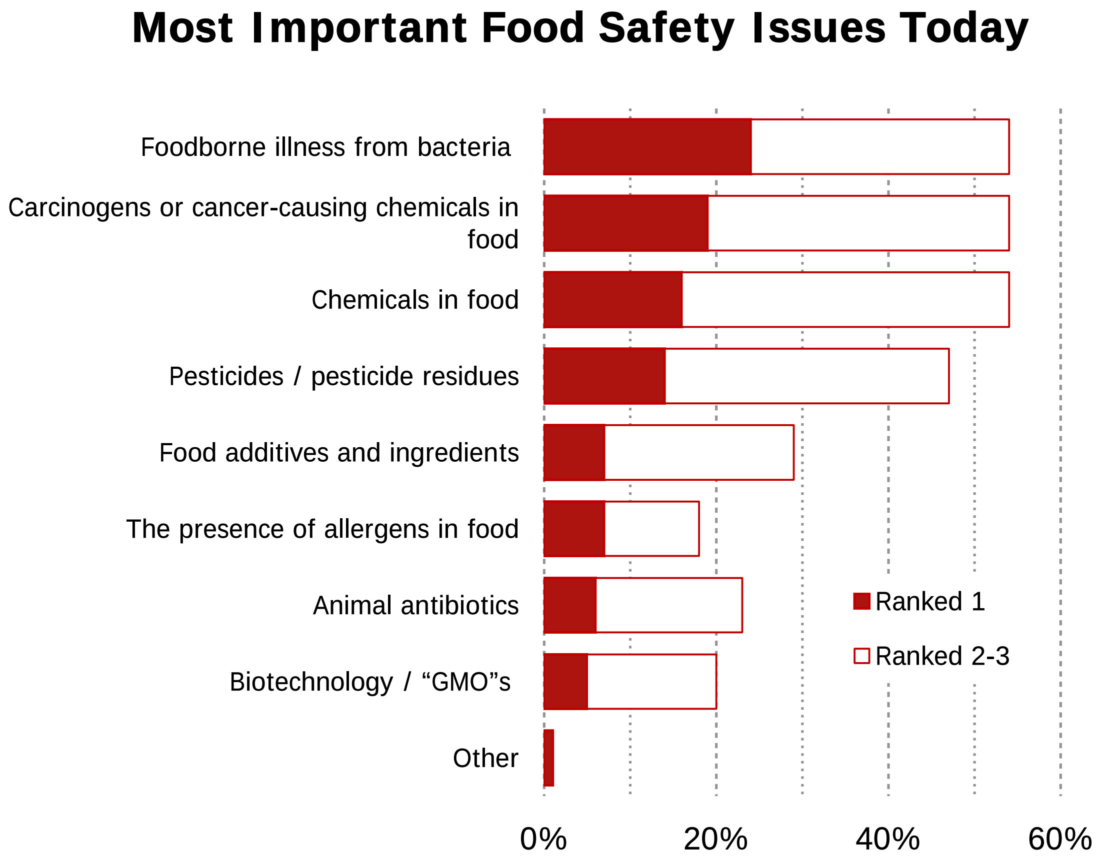


Q48: The US Food and Drug Administration recently prohibited growth-promotion uses of antibiotics and now only allows antibiotics to fight illness in animals producing food. How does this change impact your level of confidence in purchasing meat, poultry, egg, and milk products? (n=1,009)

Consumer Confidence has Risen

Foodborne illness, carcinogens and chemicals in foods continue to be pressing safety issues



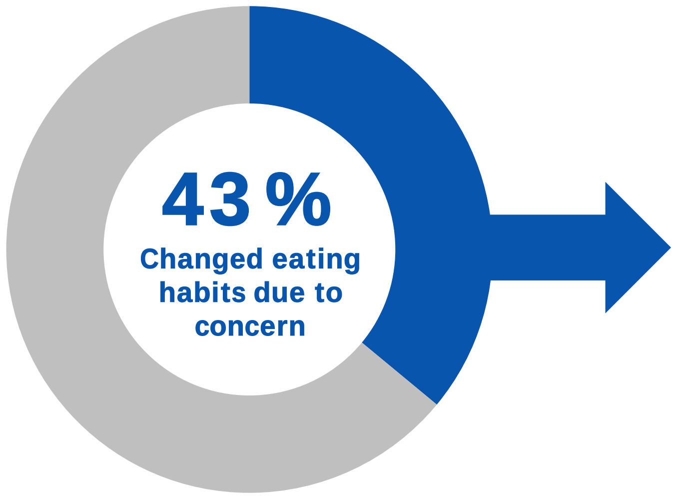


Q49: Overall, how confident are you in the safety of the US food supply? Select top answer. (n=1,009)
Q50: What in your opinion are the three most important food safety issues today? Please rank from 1 to 3, with 1=Most Important. (n=1,009)

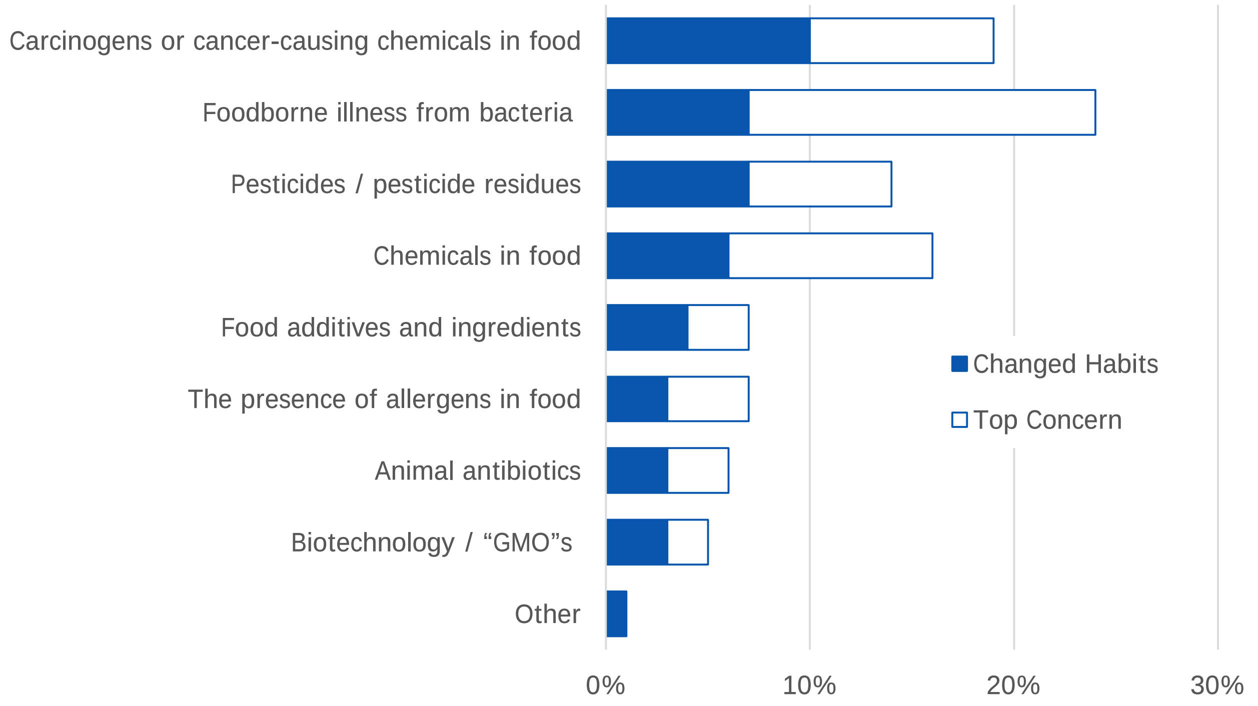
Less than Half Changed Eating Because of Safety

Carcinogens is the concern that spurs the most change in eating habits

Changed Eating Habits Due to Concerns about Top Safety Issue



Changed Habits by the Concern Driving the Change

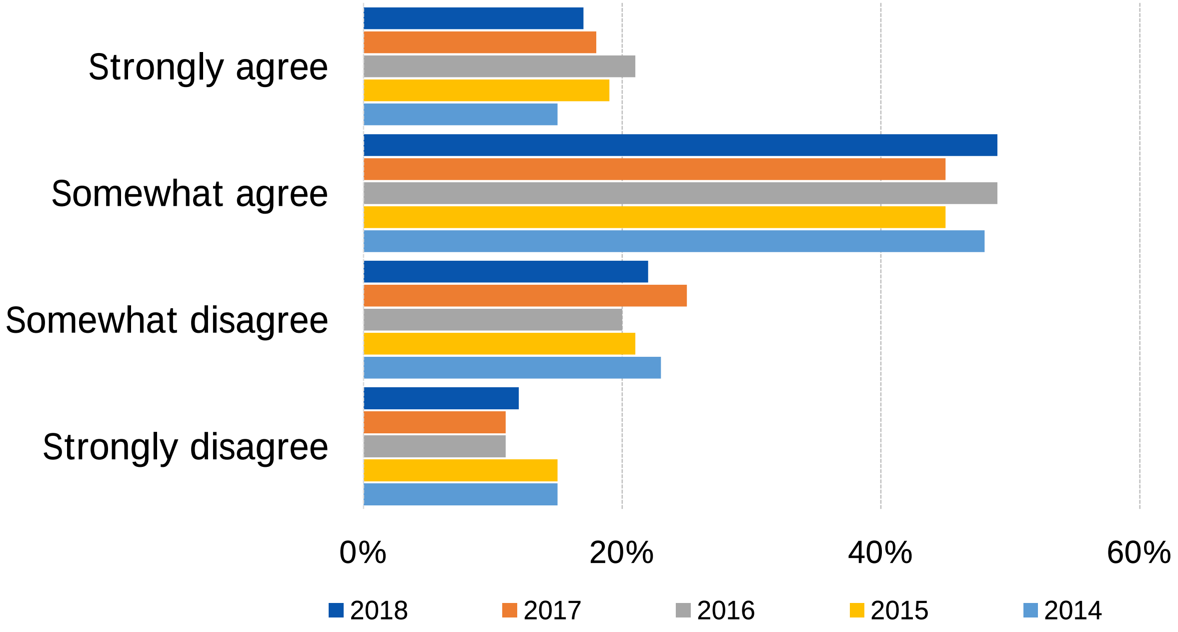


Q51: Have you changed your eating habits due to concerns about [TOP FOOD SAFETY ISSUE] ? (n=1,009)

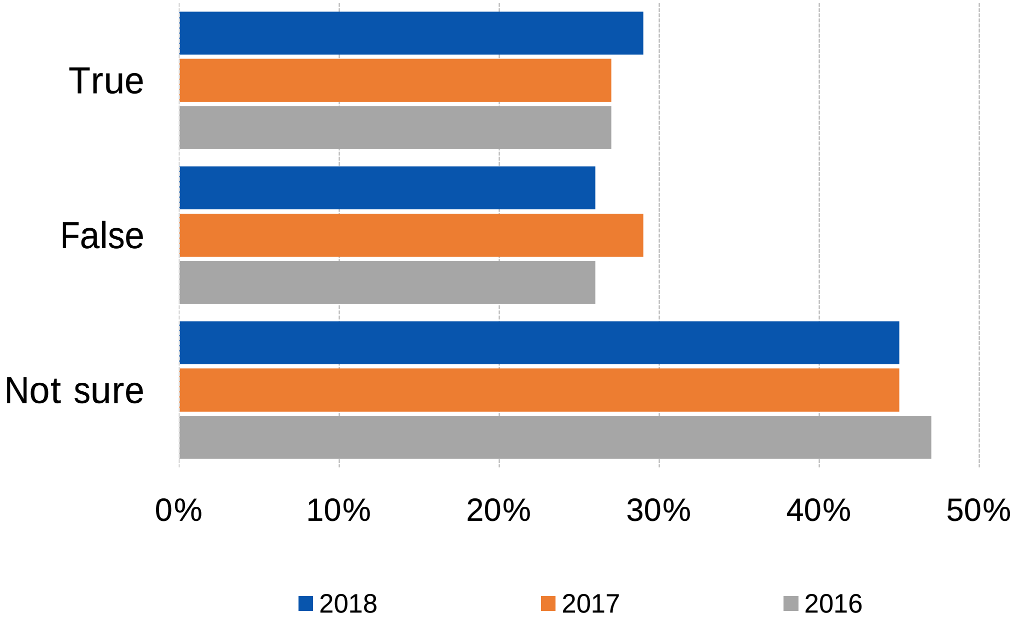
Only 1 in 6 Sure About Caffeine Consumption

Many unsure about whether there is a difference between naturally occurring and added caffeine

Knows the Amount of Caffeine in Foods and Beverages Consumed
(Of those who consume caffeine)



True or False:
Caffeine that is naturally occurring has the same effect as caffeine that is added



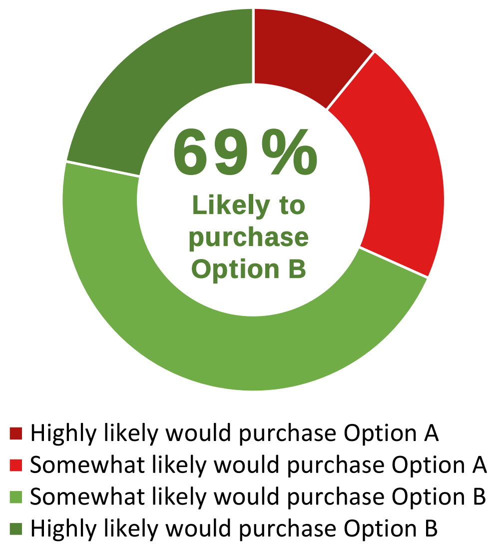
Q53: Please indicate how much you agree or disagree with the following statement: I know the amount of caffeine that is in the foods and beverages I consume (n=1,009)
Q54: Please indicate whether the following statement is true or false:
Caffeine that is naturally occurring in foods and beverages has the same effect as caffeine that is added to foods and beverages. (n=1,009)

7 in 10 Prefer No Artificial Ingredients

That said, only 4 in 10 of those who do prefer the option with no artificial ingredients would pay an additional 50% for it

Preference for Products with No Artificial Ingredients

Imagine you are going to the store to purchase a food or beverage you like. You see they have made a newer version of the product. Option A has all the original ingredients you are familiar with, including artificial ingredients. Option B has similar ingredients, except no artificial ingredients. Which option would you likely purchase?



If Option B is Preferred: If Option A costs $1.00, what is the most you would be willing to pay for Option B?

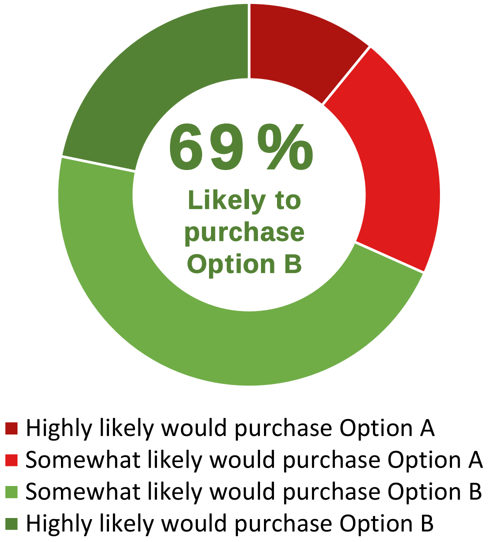
Q55: Imagine you are going to the store to purchase a food or beverage you like. You see they have made a newer version of the product. Option A has all the original ingredients you are familiar with, including artificial ingredients. Option B has similar ingredients, except no artificial ingredients. Which option would you likely purchase? (n=1,009)
Q56: If Option A costs $1.00, what is the most you would be willing to pay for Option B? (Of those who are likely to purchase Option B, n= 736)

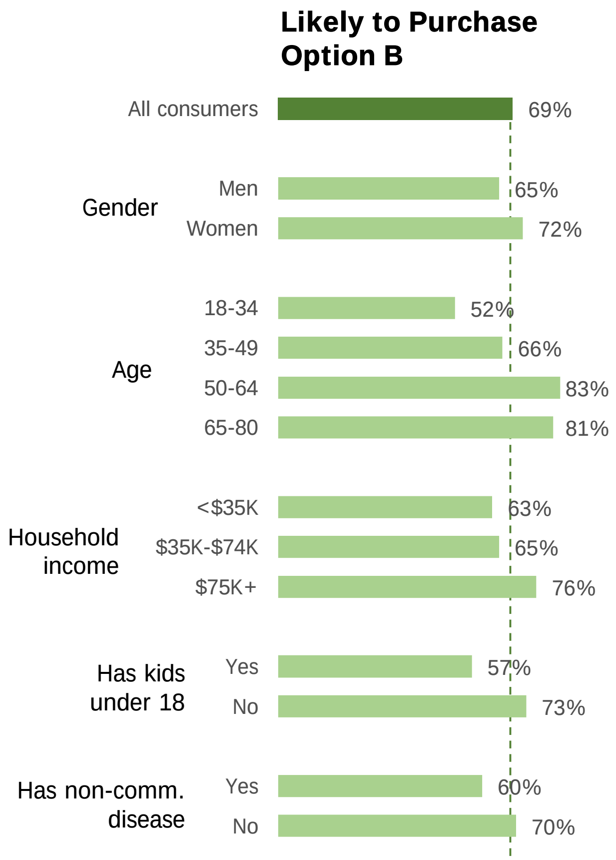
Those Who Prefer No Artificial Ingredients

Preference for Option B (without artificial ingredients) varies by age, income, gender and other demographics

Preference for Products with No Artificial Ingredients

Imagine you are going to the store to purchase a food or beverage you like. You see they have made a newer version of the product. Option A has all the original ingredients you are familiar with, including artificial ingredients. Option B has similar ingredients, except no artificial ingredients. Which option would you likely purchase?





Also more likely to purchase option B:

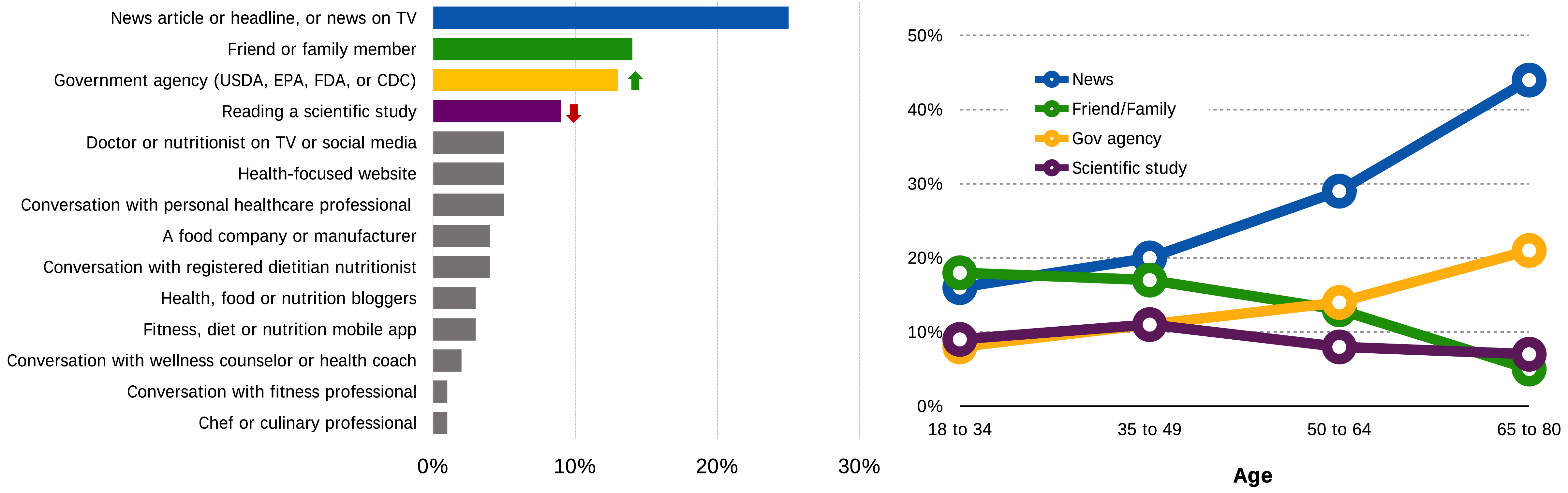
- Non-Hispanic white consumers
- Those with higher education

Q55: Imagine you are going to the store to purchase a food or beverage you like. You see they have made a newer version of the product. Option A has all the original ingredients you are familiar with, including artificial ingredients. Option B has similar ingredients, except no artificial ingredients. Which option would you likely purchase? (n=1,009)

News Sources Impact Opinion on Food Safety

Generations influenced by different sources, with younger adults more influenced by family, doctors on tv or food companies

Top Source of Influence on Opinion about Top Safety Concern

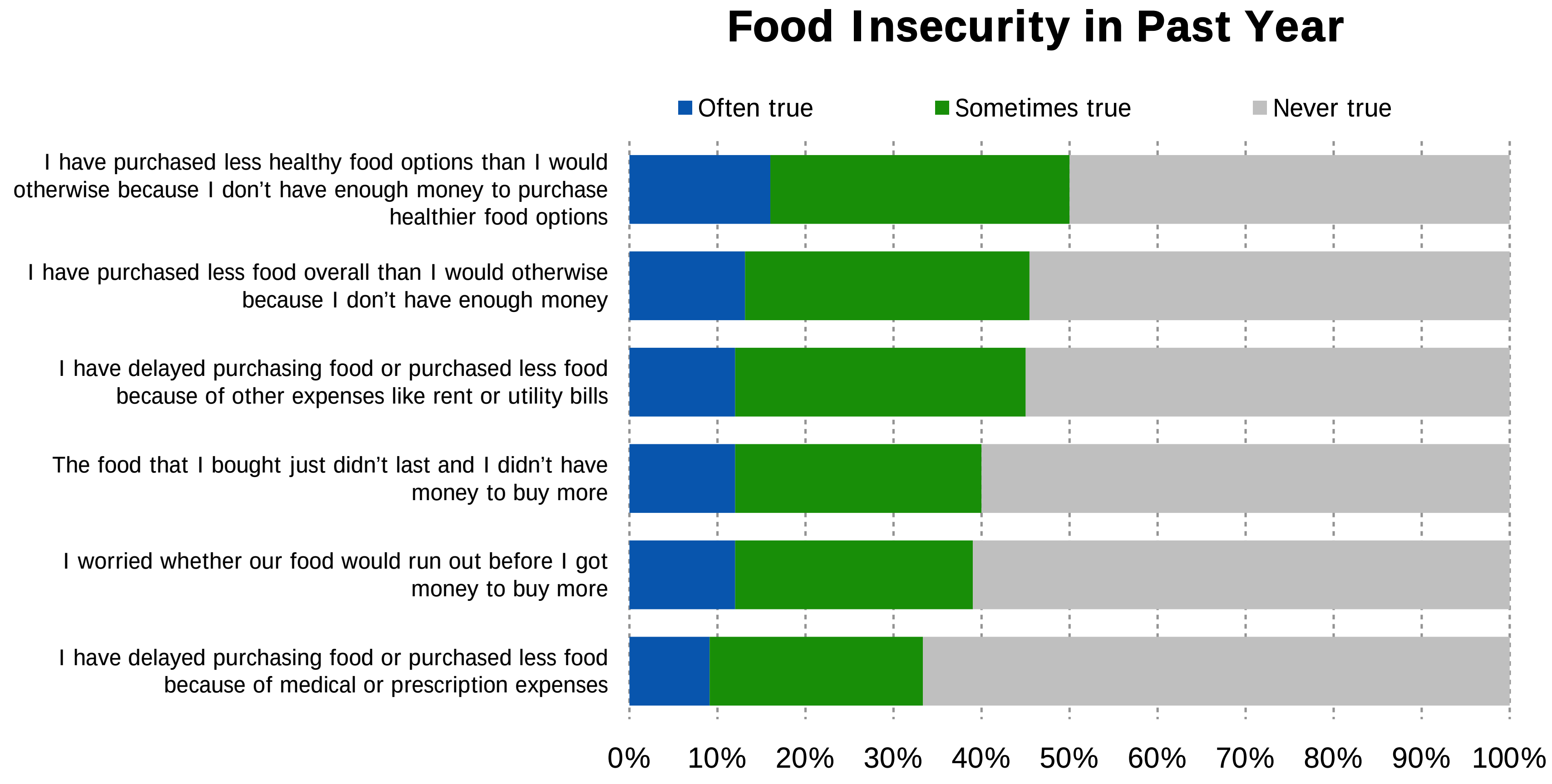


Q52: What one source of information most influenced your opinion on [TOP FOOD SAFETY ISSUE]? (n=1,009)

Food Insecurity Remains a Significant Barrier to Eating a Healthy Diet

Food Insecurity Impacts Many Americans

1 in 6 say they have often chosen less healthy options and 1 in 8 often worry about food running out



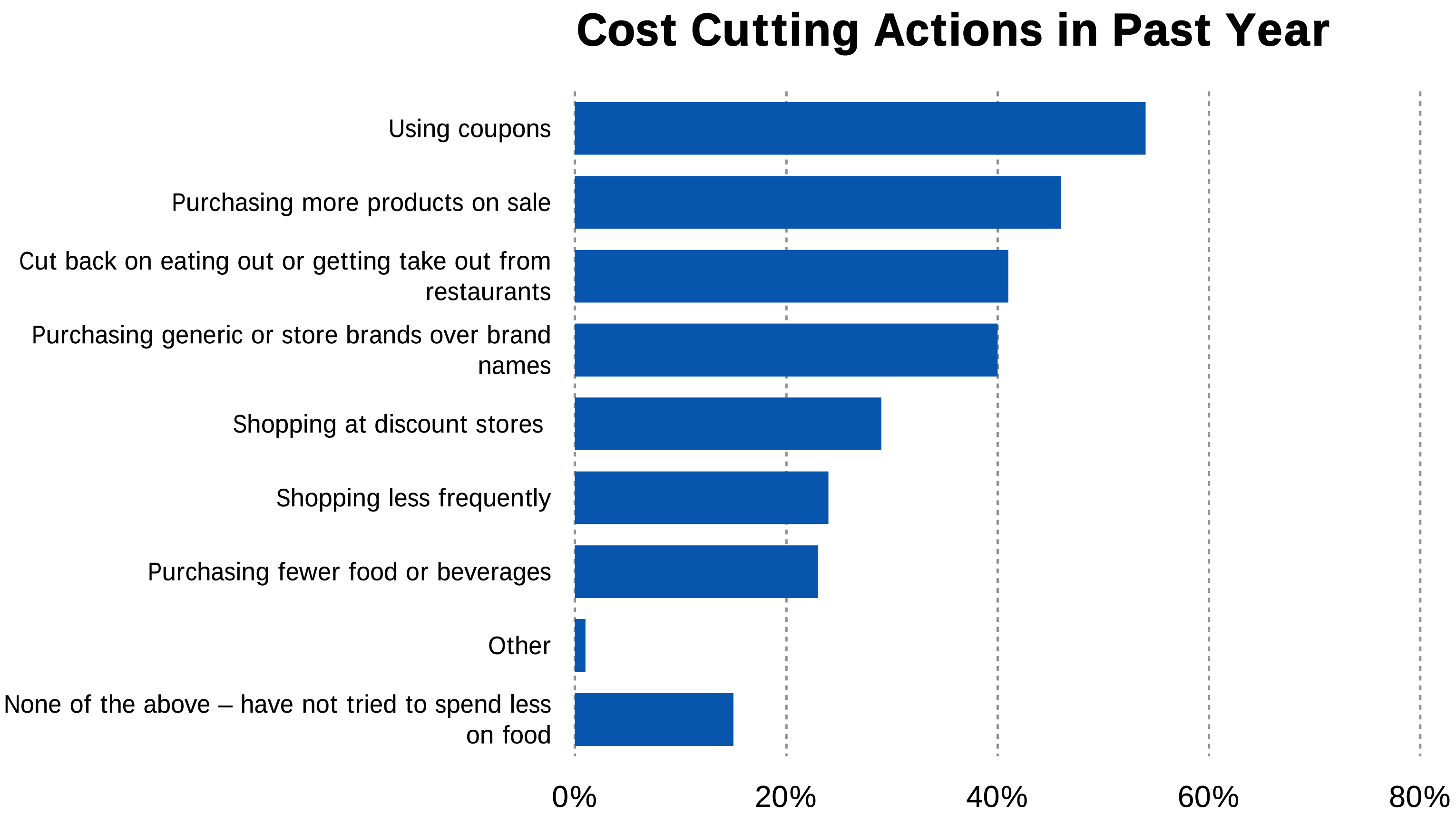
30%
Of those in fair/poor health say they often choose less healthy options because of cost, double that of healthier Americans

21%
Of parents (with kids under 18) say they often choose less healthy options. Parents are also more likely to often delay buying food to pay bills and to worry that food will run out

Q20: In the past 12 months…? (n=1,009)

Consumers Take Steps to Limit Food Costs

Coupons and purchasing products on sale most common ways to cut costs



Women, more than men, take action to limit costs, including using coupons, purchasing sale items or buying generic brands

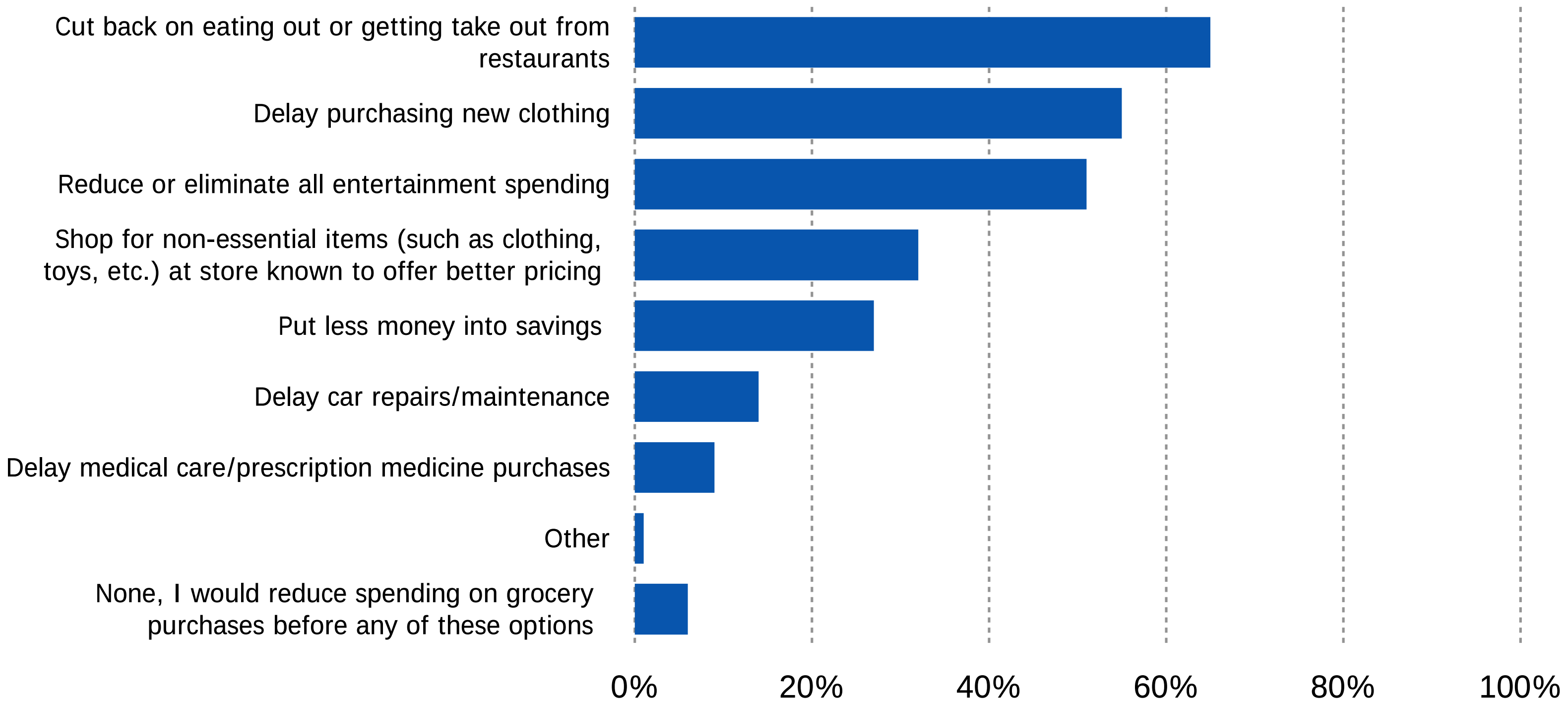
Younger adults consume less food and cutback on eating out

Q21: In the past 12 months, have you done any of the following in order to spend less on food and beverages? Select all that apply. (n=1,009)

Consumers Work to Avoid Reducing Groceries

Cutting back on eating out, delaying new clothing purchases and reducing entertainment costs top steps that will be taken

Cost Cutting Actions Consumers Would Take Before Reducing Amount Spent on Groceries



70%
Of those age 65+ will cut back on eating out, compared to **57%** of those under age 35

13%
Of people with children under 18 will delay medical care

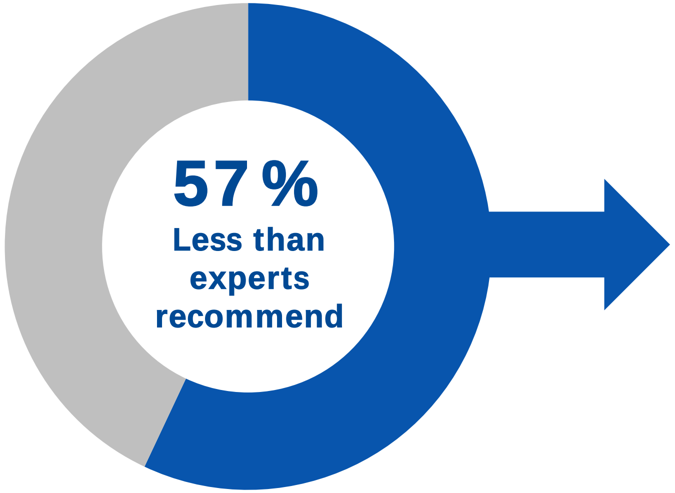
Younger consumers in general are also more likely to delay medical care

Q22: If you needed to cut back on your spending one month, which of the following would you do before reducing the amount you spend on grocery purchases? Select all that apply. (n=1,009)

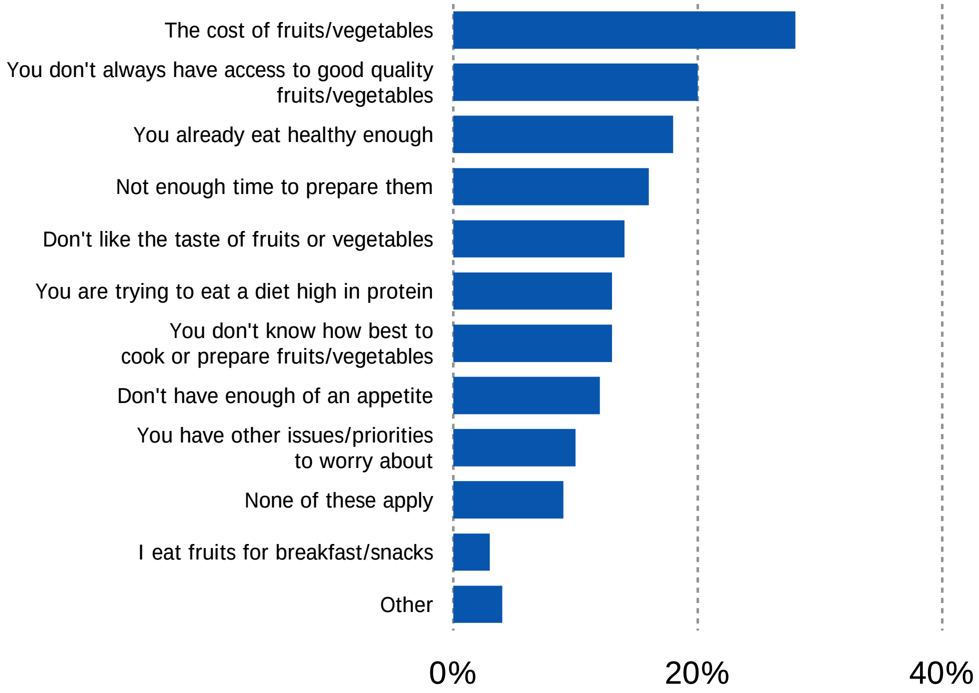
Cost, Access Are Top Barriers

Nearly 6 in 10 eat less fruits/vegetables than they think an expert would recommend; cost is top barrier, especially for millennials and parents

Get Less Fruits/Vegetables Than What They Believe Experts Recommend



Barriers to Eating More Fruits/Vegetables

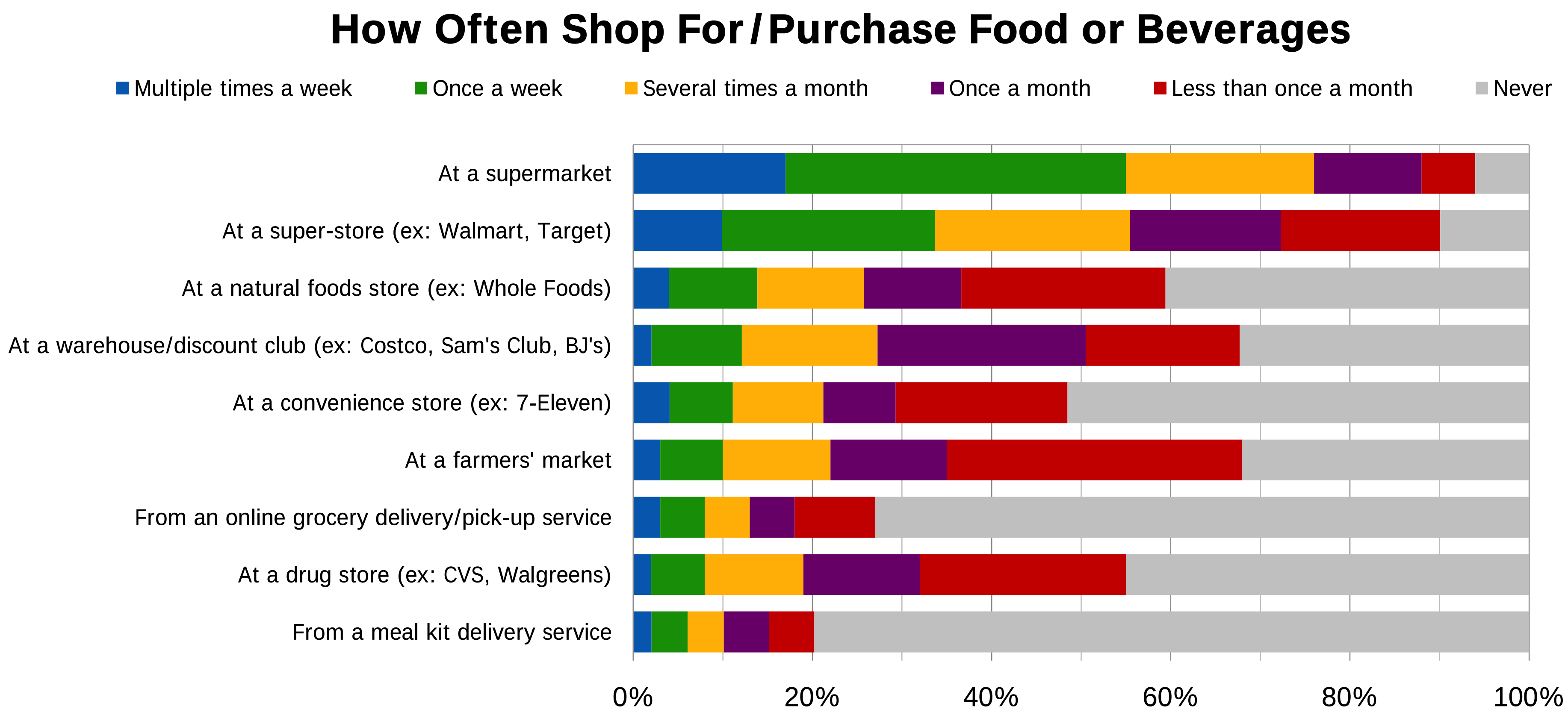


Q2: What percentage of a healthy adult's plate do you think health experts recommend should contain each of the following types of food? Please note, your response must total to 100% (n=1,009)
Q5: The amount of fruit and vegetables you get in the average meal is less than the amount you think a health expert would recommend. Which of the following reasons prevent you from eating more fruits/vegetables? Select all that apply. (If own fruit/veg % is less than "expert recommends" n=587)

Consumers Lack Comfort with Shopping Online and See Cost as Barrier

Supermarket Remains Top Source of Food

Men more likely to use drug stores, convenience stores and online or meal kit delivery services

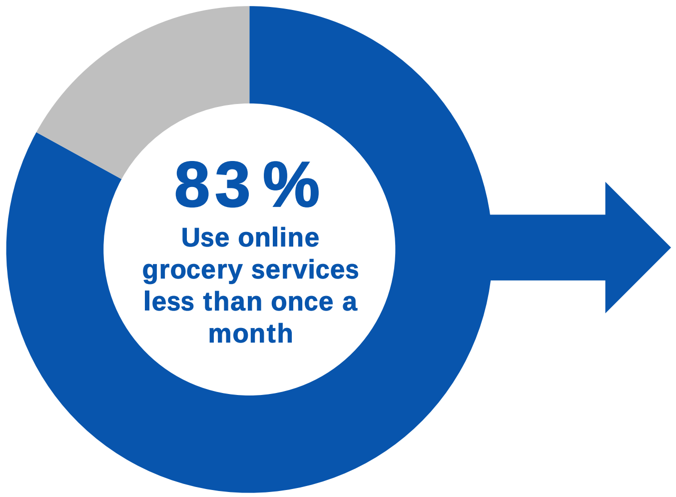


Q16: How often do you shop for/purchase food and beverages… (n=1,009)

Use of Online Delivery / Meal Kits Limited

Consumers cite desire to shop in-person and cost of these services are barriers to use

How Often Shop / Purchase from Online Grocery Delivery / Meal-Kit Service



Reasons Don't Use Online Grocery Delivery / Meal-Kit Service Often

Q16: How often do you shop for/purchase food and beverages… (n=1,009)
Q17: Which of the following are reasons why you don't use online grocery or meal kit delivery services (more often)? Select all that apply. (If less than once a month/never shops or purchases from online grocery delivery/pick-up service, n=846)

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