# Table of Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Background</td>
<td>3</td>
</tr>
<tr>
<td>Methodology</td>
<td>4</td>
</tr>
<tr>
<td>Executive Summary</td>
<td>5</td>
</tr>
<tr>
<td>Demographics</td>
<td>7</td>
</tr>
<tr>
<td>Detailed Findings</td>
<td>11</td>
</tr>
</tbody>
</table>
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.
• 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.
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

#### Household Income

<table>
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<tr>
<th>Income Range</th>
<th>Percentage</th>
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</thead>
<tbody>
<tr>
<td>Less than $35,000</td>
<td>22%</td>
</tr>
<tr>
<td>$35,000 to $49,999</td>
<td>16%</td>
</tr>
<tr>
<td>$50,000 to $74,999</td>
<td>21%</td>
</tr>
<tr>
<td>$75,000 to $99,999</td>
<td>15%</td>
</tr>
<tr>
<td>$100,000 to $149,999</td>
<td>13%</td>
</tr>
<tr>
<td>$150,000 and above</td>
<td>8%</td>
</tr>
<tr>
<td>Don't know</td>
<td>1%</td>
</tr>
<tr>
<td>Prefer not to answer</td>
<td>5%</td>
</tr>
</tbody>
</table>

#### Education

<table>
<thead>
<tr>
<th>Education Level</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than high school</td>
<td>4%</td>
</tr>
<tr>
<td>Graduated high school</td>
<td>34%</td>
</tr>
<tr>
<td>Some college</td>
<td>17%</td>
</tr>
<tr>
<td>AA degree/technical/vocational degree</td>
<td>12%</td>
</tr>
<tr>
<td>Bachelor's degree</td>
<td>22%</td>
</tr>
<tr>
<td>Graduate/professional degree</td>
<td>12%</td>
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#### Gender

<table>
<thead>
<tr>
<th>Gender</th>
<th>Percentage</th>
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</thead>
<tbody>
<tr>
<td>Male</td>
<td>49%</td>
</tr>
<tr>
<td>Female</td>
<td>51%</td>
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#### Age

<table>
<thead>
<tr>
<th>Age Range</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>18 to 34</td>
<td>31%</td>
</tr>
<tr>
<td>35 to 49</td>
<td>25%</td>
</tr>
<tr>
<td>50 to 64</td>
<td>26%</td>
</tr>
<tr>
<td>65 to 80</td>
<td>18%</td>
</tr>
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#### Race/Ethnicity

<table>
<thead>
<tr>
<th>Race/Ethnicity</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>White</td>
<td>64%</td>
</tr>
<tr>
<td>Hispanic/Latino/Spanish descent</td>
<td>15%</td>
</tr>
<tr>
<td>Black or African American</td>
<td>12%</td>
</tr>
<tr>
<td>Asian or Pacific Islander</td>
<td>6%</td>
</tr>
<tr>
<td>Other</td>
<td>2%</td>
</tr>
</tbody>
</table>
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

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Normal or Low</td>
<td>37%</td>
</tr>
<tr>
<td>Overweight</td>
<td>32%</td>
</tr>
<tr>
<td>Obese</td>
<td>28%</td>
</tr>
<tr>
<td>No answer</td>
<td>3%</td>
</tr>
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### Weight

<table>
<thead>
<tr>
<th>Weight Range</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than 100 pounds</td>
<td>2%</td>
</tr>
<tr>
<td>100 to 149 pounds</td>
<td>28%</td>
</tr>
<tr>
<td>150 to 199 pounds</td>
<td>41%</td>
</tr>
<tr>
<td>200 to 249 pounds</td>
<td>18%</td>
</tr>
<tr>
<td>250 to 299 pounds</td>
<td>5%</td>
</tr>
<tr>
<td>300 to 349 pounds</td>
<td>1%</td>
</tr>
<tr>
<td>350 to 399 pounds</td>
<td>2%</td>
</tr>
<tr>
<td>400 pounds or more</td>
<td>*</td>
</tr>
<tr>
<td>Prefer not to answer</td>
<td>2%</td>
</tr>
</tbody>
</table>

### Height

<table>
<thead>
<tr>
<th>Height Range</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than 5’0</td>
<td>4%</td>
</tr>
<tr>
<td>5’0 to 5’5</td>
<td>34%</td>
</tr>
<tr>
<td>5’6 to 5’11</td>
<td>45%</td>
</tr>
<tr>
<td>6’0 or taller</td>
<td>16%</td>
</tr>
</tbody>
</table>

### Diseases

<table>
<thead>
<tr>
<th>Disease</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>High blood pressure</td>
<td>25%</td>
</tr>
<tr>
<td>High cholesterol</td>
<td>20%</td>
</tr>
<tr>
<td>Stress/anxiety/depression</td>
<td>13%</td>
</tr>
<tr>
<td>Diabetes</td>
<td>11%</td>
</tr>
<tr>
<td>Overweight/obesity</td>
<td>8%</td>
</tr>
<tr>
<td>Cancer</td>
<td>4%</td>
</tr>
<tr>
<td>Heart disease</td>
<td>3%</td>
</tr>
<tr>
<td>Muscle strength/mobility</td>
<td>3%</td>
</tr>
<tr>
<td>Osteoporosis</td>
<td>2%</td>
</tr>
<tr>
<td>Attention deficit hyperactivity disorder</td>
<td>2%</td>
</tr>
<tr>
<td>Stroke</td>
<td>1%</td>
</tr>
<tr>
<td>None of the above</td>
<td>49%</td>
</tr>
</tbody>
</table>
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.

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

- 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.
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.

Interest in Health Benefits from Food and Nutrients

- Cardiovascular health
- Weight loss/weight management
- Energy
- Brain function (memory, focus, cognition)
- Digestive health
- Muscle health/strength
- Immune function
- Diabetes management/blood sugar
- Emotional/mental health
- Bone health
- Athletic Performance
- None of the above
- Other

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

38%
Able to name a food they would seek for top health issue

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

- Sugars: 33%
- Carbohydrates: 25%
- Fats: 16%
- Protein: 17%
- All sources same: 3%
- Not sure: 5%

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

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.
Consumers Take Multiple Actions to Limit Sugar

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

- **77%** are trying to limit/avoid sugars

**Actions Taken to Limit/Avoid Sugars** *(Of those limiting/avoiding sugars)*

- Drinking water instead of caloric beverages: 80%
- Eliminating certain foods and beverages from my diet: 65%
- No longer adding table sugar to foods and beverages: 40%
- Consume smaller portions: 35%
- Using the Nutrition Facts label to choose foods and beverages with less sugar: 35%
- Reducing the number of calories I consume each day: 30%
- Using low-calorie sweeteners instead of adding sugar: 25%
- Ordering or purchasing “sugar-free” options*: 20%
- Switching to low- or no-calorie beverage options*: 15%
- Reducing fruit intake: 10%

*Response text has been abridged

Q34: Are you trying to limit or avoid sugars in your diet? (n=1,009)
Q35: What actions are you taking to limit or avoid sugars? (Of those limiting/avoiding sugars, n=802)

*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**
- Soft drinks
- Candy
- Baked goods (cookies, cakes, pastries)
- Frozen desserts (ice cream, frozen yogurt)
- Juice flavored drinks (fruit punch)
- Sweetened teas and coffees
- Breads (bagels, dinner rolls)
- Sweet snacks (granola bars, trail mix)

**Less Common Responses**
- Energy drinks
- 100% fruit juice
- Breakfast cereal
- Yogurt
- Sauces and condiments
- Fruits
- Dairy substitutes (soy, almond milk)
- Milk or other dairy products
- Other

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**

- **29%** Use low/no calorie sweeteners
- Any type of sugar (table sugar, honey, maple syrup)
- Low/no calorie sweeteners (aspartame, sucralose, stevia)
- I don’t use any type of sugar or low/no-calorie sweeteners

**Perceived Benefits of Using Low/ No-Calorie Sweeteners**

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

- Consume less sugar: 29%
- Manage diabetes or control blood sugar
- Consume fewer calories
- Lose weight
- Maintain my weight
- Reduce carbohydrate intake
- Consume an appropriate amount of total calories
- Consume an appropriate amount of sugar
- Other
- None of the above

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

- Very positive: 11% (Very / Somewhat positive)
- Somewhat positive: 20%
- Neutral: 26%
- Somewhat negative: 33%
- Very negative: 12%
- Not sure: 2%

Change in Opinion of Added Sugars in the Past Year

- Much more positive: 11% (Very / Somewhat positive)
- Somewhat more positive: 12%
- My opinion hasn't changed: 59%
- Somewhat more negative: 32%
- Much more negative: 26%
- Not sure: 2%

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

- Very positive: 23% (Very/Somewhat positive)
- Somewhat positive: 17% (Much more/Somewhat more positive)
- Neutral: 45% (Very/Somewhat negative)
- Somewhat negative: 25% (Much more/Somewhat more negative)
- Very negative: 20% (Not sure)
- Not sure: 0%

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

- Much more positive: 17% (Much more/Somewhat more positive)
- Somewhat more positive: 60% (My opinion hasn't changed)
- Somewhat more negative: 25% (Much more/Somewhat more negative)
- Much more negative: 20% (Not sure)
- Not sure: 0%

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

Familiarity with the MyPlate Graphic

- I have seen it and know a lot about it
- I have seen it and know a fair amount about it
- I have seen it but know very little about it
- I have never seen it before
- Not sure

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

- 59% Have seen the MyPlate graphic
- 69% Of parents with children under 18 have seen the MyPlate graphic
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
- Fruits: 12%
- Grains: 21%
- Vegetables: 29%
- Protein: 38%

What Consumers Believe Experts Recommend
- Fruits: 21%
- Grains: 20%
- Vegetables: 30%
- Protein: 29%

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

36% Followed a specific eating pattern in the past year

Type of Eating Pattern Followed

- Intermittent fasting
- Paleo diet
- Gluten-free diet
- Low-carb diet
- Mediterranean diet
- Whole 30
- High-protein diet
- Vegetarian or vegan diet
- Weight-loss plan
- Cleanse
- DASH diet
- Ketogenic or high-fat diet
- Other

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

NET: Low-carb-related diets
Motivators for Adopting Specific Eating Pattern

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

Motivations for Adopting a New Eating Pattern
(Of those who followed a specific eating pattern in past year)

- I wanted to lose weight
- I wanted to feel better and have more energy
- I wanted to protect my long-term health/prevent future health conditions
- I wanted to prevent weight gain
- I wanted to improve my health so I can have more independence in life
- I noticed a change in my physical appearance
- A conversation with my personal health care professional
- I was diagnosed with a health condition
- I wanted to prevent any changes in my physical appearance
- A conversation with a friend or family member
- I wanted to set a good example for my friends and family
- A news article, blog post, or study that discussed the effects of poor eating habits
- Other

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

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

How Often Do You Do the Following…

- I stop eating when I’ve had enough but not too much
- I pay close attention to the flavors and textures of my food as I eat
- I stop myself from eating if I’m not hungry
- I try not to eat before or after a certain time of day
- I skip at least one meal a day
- I snack at least twice a day
- I try to limit distractions when I am eating a meal or snack
- I replace at least one meal a day with snacks

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

Q26: Which of the following best describes your familiarity and interest in the practice of "mindful eating"? (Split Sample A, n=506)
- I have heard of it, and I am interested in learning more: 47%
- I have heard of it, but I do not want to learn more: 55%
- I have not heard of it, but I am interested in learning more: 55%
- I have not heard of it, and I do not want to learn more: 55%

Q26b: Which of the following best describes your familiarity and interest in the practice of "intuitive eating"? (Split Sample B, n=503)
- Few Familiar With Intuitive Eating
- I have heard of it, and I am interested in learning more: 26%
- I have heard of it, but I do not want to learn more: 29%
- I have not heard of it, but I am interested in learning more: 55%
- I have not heard of it, and I do not want to learn more: 55%

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

Intuitive eating
- NET familiarity: 26%
- NET interest: 55%
Parents Introduce Solid Foods for Many Reasons

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

Reasons to Introduce Solid Food to Infants

(Among those who have children)

0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

- Add extra vitamins, minerals, and other nutrients to the infant’s diet
- Help the infant develop a preference for nutrient-rich foods
- Help the infant safely explore new tastes and textures
- Expose to common allergens to help prevent the development of food allergies
- Add extra calories to the infant’s diet

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
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)

Conflicting Information Creates “Confusion”

- 80% Strongly/ Somewhat Agree
- 78% Of Hispanic consumers strongly/somewhat agree
- 59% Strongly/ Somewhat Agree
Consumers Put Trust in Health Professionals

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

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

- Conversation with registered dietitian nutritionist
- Conversation with personal healthcare professional
- Conversation with wellness counselor or health coach
- Reading a scientific study
- Conversation with fitness professional
- Government agency (USDA, EPA, FDA, or CDC)¹
- Health-focused website
- Doctor or nutritionist on TV or via social media²
- Chef or culinary professional
- Fitness, diet or nutrition mobile app
- Health, food or nutrition bloggers
- Friend or family member
- News article or headline, or news on TV³
- A food company or manufacturer

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

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

- Conversation with personal healthcare professional
- Friend or family member
- News article or headline, or news on TV
- Conversation with registered dietitian nutritionist
- Health-focused website
- Reading a scientific study
- Doctor or nutritionist on TV or via social media
- Conversation with wellness counselor or health coach
- Conversation with fitness professional
- Government agency (USDA, EPA, FDA, or CDC)
- Fitness, diet or nutrition mobile app
- Health, food or nutrition bloggers
- A food company or manufacturer
- Chef or culinary professional

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”

Consumers at a lower BMI are more likely to listen to friends, personal healthcare professional and health coaches.
Relationship Between Trust and Reliance

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

Level of Trust vs. Reliance as a Source

Degree of Trust (% 1-5 out of 5)

Reliance as Source (% 1-5 out of 5)
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

- 54% Get information from a personal healthcare professional

Changed Eating Habits as Result of Conversation

- Yes, completely changed my eating habits (i.e., started a new diet plan or eating pattern)
- Yes, made significant changes (i.e., reduced or eliminated certain types of foods)
- Yes, made minor changes (i.e., eat a serving of vegetables at lunch)
- No, have not made any changes

78% of consumers made a change

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)

- Taste
- Price
- Healthfulness
- Convenience
- Sustainability

2018

Taste: 61%
Price: 64%
Healthfulness: 61%
Convenience: 54%
Sustainability: 59%
Familiarity is an Important Purchase Driver

Key drivers, like taste, remain unchanged from 2017

Drivers of Food/ Beverage Purchases

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

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.
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.

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

All three packaging information types were viewed most by:

- Those in excellent/very good health
- Those who say sustainability is very important
Consumers See Many Nutrients As Healthy

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

**Perceived Healthfulness of Foods**

- **Vitamin D**: Healthy by 80% of consumers, Neither healthy nor unhealthy by 20%
- **Fiber**: Healthy by 80% of consumers, Neither healthy nor unhealthy by 20%
- **Whole grains**: Healthy by 80% of consumers, Neither healthy nor unhealthy by 20%
- **Protein from plant sources**: Healthy by 80% of consumers, Neither healthy nor unhealthy by 20%
- **Omega-3 fatty acids**: Healthy by 80% of consumers, Neither healthy nor unhealthy by 20%
- **Probiotics**: Healthy by 80% of consumers, Neither healthy nor unhealthy by 20%
- **Enriched refined grains**: Healthy by 80% of consumers, Neither healthy nor unhealthy by 20%
- **Animal protein**: Healthy by 80% of consumers, Neither healthy nor unhealthy by 20%
- **Unsaturated fats**: Healthy by 80% of consumers,Neither healthy nor unhealthy by 20%
- **Prebiotics**: Healthy by 80% of consumers, Neither healthy nor unhealthy by 20%
- **Fortified foods**: Healthy by 80% of consumers, Neither healthy nor unhealthy by 20%
- **EPA/DHA**: Healthy by 80% of consumers, Neither healthy nor unhealthy by 20%
- **Saturated fats**: Healthy by 80% of consumers, Neither healthy nor unhealthy by 20%

**% Healthy by Gender**

- **Vitamin D**: Men 80%, Women 81%
- **Omega-3s**: Men 80%, Women 81%
- **Probiotics**: Men 80%, Women 81%

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

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

<table>
<thead>
<tr>
<th>Contains GMO Ingredients</th>
<th>Contains Non-GMO Ingredients</th>
</tr>
</thead>
<tbody>
<tr>
<td>60%</td>
<td>40%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Longer List of Ingredients</th>
<th>Shorter List of Ingredients</th>
</tr>
</thead>
<tbody>
<tr>
<td>60%</td>
<td>40%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Tastes Sweeter</th>
<th>Tastes Less Sweet</th>
</tr>
</thead>
<tbody>
<tr>
<td>60%</td>
<td>40%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Produced With Newer Technology</th>
<th>Not Produced With Newer Technology</th>
</tr>
</thead>
<tbody>
<tr>
<td>60%</td>
<td>40%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Produced in More Environmentally Sustainable Way</th>
<th>Produced in Less Environmentally Sustainable Way</th>
</tr>
</thead>
<tbody>
<tr>
<td>60%</td>
<td>40%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Fresh Food Product</th>
<th>Frozen Food Product</th>
</tr>
</thead>
<tbody>
<tr>
<td>60%</td>
<td>40%</td>
</tr>
</tbody>
</table>

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)

- Contains GMO Ingredients
- Longer List of Ingredients
- Tastes Sweeter
- Produced With Newer Technology
- Produced in More Environmentally Sustainable Way
- Fresh Food Product

**Highly Likely This Product is Healthier**

- Contains Non-GMO Ingredients
- Shorter List of Ingredients
- Tastes Less Sweet
- Not Produced With Newer Technology
- Produced in Less Environmentally Sustainable Way
- Frozen Food Product

**Somewhat Likely This Product is Healthier**

- Contains GMO Ingredients
- Longer List of Ingredients
- Tastes Sweeter
- Produced With Newer Technology
- Produced in More Environmentally Sustainable Way
- Fresh Food Product

*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.*
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

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

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.
Knowing Food Sources Key to Restaurant Choice

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

**Important Factors When Choosing a Restaurant or Cafeteria**

- **Knowing the food contains only natural ingredients**
- **Knowing where the food comes from**
- **Understanding how the food is produced**
- **Knowing that the restaurant has a commitment to environmental sustainability**
- **Availability of organic options**

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

- **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
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)
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

59% Important

Ranked Important Aspects of Sustainable Food Production
(Of those who say it’s important their food be produced sustainably)

- Reducing the amount of pesticides*
- Ensuring an affordable food supply
- Conserving the natural habitat*
- Ensuring sufficient food supply for the growing population*
- Conserving farmland over multiple generations
- Less food and energy waste
- Produce more food with less use of natural resources
- Fewer food miles (shorter distance from farm to point of purchase)
- None of the above are important*

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?

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)

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

2018:
- 62% More Confident

2017:
- 50% More Confident
Consumer Confidence has Risen

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

Confidence in Overall Food Supply

- Very confident: 68% (Very / Somewhat confident)
- Somewhat confident
- Not too confident: 28% (Not too / Not at all confident)
- Not at all confident
- Not sure

Most Important Food Safety Issues Today

- Foodborne illness from bacteria
- Carcinogens or cancer-causing chemicals in food
- Chemicals in food
- Pesticides / pesticide residues
- Food additives and ingredients
- The presence of allergens in food
- Animal antibiotics
- Biotechnology / “GMO”s
- Other

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

43% Changed eating habits due to concern

Changed Habits by the Concern Driving the Change

- Carcinogens or cancer-causing chemicals in food
- Foodborne illness from bacteria
- Pesticides / pesticide residues
- Chemicals in food
- Food additives and ingredients
- The presence of allergens in food
- Animal antibiotics
- Biotechnology / “GMO”s
- Other

Q53: 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

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)

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

Strongly agree
Somewhat agree
Somewhat disagree
Strongly disagree

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

True
False
Not sure

0% 20% 40% 60%


0% 10% 20% 30% 40% 50%

2018 2017 2016
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?

- Highly likely would purchase Option A
- Somewhat likely would purchase Option A
- Somewhat likely would purchase Option B
- Highly likely would purchase Option B

69% Likely to purchase Option B

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

- Only 62% would pay more than $1.00
- 4 in 10 would pay an additional 50%
- 1 in 5 would go as high as 2x the base cost

Max Price Willing to Pay

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)
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?

69% Likely to purchase Option B

- Highly likely would purchase Option A
- Somewhat likely would purchase Option A
- Somewhat likely would purchase Option B
- Highly likely would purchase Option B

Likely to Purchase Option B

- All consumers: 69%
- Gender: Men 65%, Women 72%
- Age: 18-34 52%, 35-49 66%, 50-64 83%, 65-80 81%
- Household income: <$35K 63%, $35K-$74K 65%, $75K+ 76%
- Has kids under 18: Yes 57%, No 73%
- Has non-comm. disease: Yes 60%, No 70%

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

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

- News article or headline, or news on TV
- Friend or family member
- Government agency (USDA, EPA, FDA, or CDC)
- Reading a scientific study
- Doctor or nutritionist on TV or social media
- Health-focused website
- Conversation with personal healthcare professional
- A food company or manufacturer
- Conversation with registered dietitian nutritionist
- Health, food or nutrition bloggers
- Fitness, diet or nutrition mobile app
- Conversation with wellness counselor or health coach
- Conversation with fitness professional
- Chef or culinary professional

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

Food Insecurity in Past Year

- I have purchased less healthy food options than I would otherwise because I don’t have enough money to purchase healthier food options
- I have purchased less food overall than I would otherwise because I don’t have enough money
- I have delayed purchasing food or purchased less food because of other expenses like rent or utility bills
- The food that I bought just didn’t last and I didn’t have money to buy more
- I worried whether our food would run out before I got money to buy more
- I have delayed purchasing food or purchased less food because of medical or prescription expenses

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

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)

Cost Cutting Actions in Past Year

- Using coupons
- Purchasing more products on sale
- Cut back on eating out or getting take out from restaurants
- Purchasing generic or store brands over brand names
- Shopping at discount stores
- Shopping less frequently
- Purchasing fewer food or beverages
- Other
- None of the above – have not tried to spend less on food

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
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 before reducing the amount spent on groceries.

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

- Cut back on eating out or getting take out from restaurants: 60%
- Delay purchasing new clothing: 50%
- Reduce or eliminate all entertainment spending: 40%
- Shop for non-essential items (such as clothing, toys, etc.) at store known to offer better pricing: 30%
- Put less money into savings: 20%
- Delay car repairs/maintenance: 10%
- Delay medical care/prescription medicine purchases: 5%
- Other: 5%
- None, I would reduce spending on grocery purchases before any of these options: 5%

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

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

How Often Shop For/ Purchase Food or Beverages

<table>
<thead>
<tr>
<th>Source</th>
<th>Multiple times a week</th>
<th>Once a week</th>
<th>Several times a month</th>
<th>Once a month</th>
<th>Less than once a month</th>
<th>Never</th>
</tr>
</thead>
<tbody>
<tr>
<td>At a supermarket</td>
<td>40%</td>
<td>40%</td>
<td>10%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>At a super-store (ex: Walmart, Target)</td>
<td>40%</td>
<td>40%</td>
<td>10%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>At a natural foods store (ex: Whole Foods)</td>
<td>40%</td>
<td>40%</td>
<td>10%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>At a warehouse/discount club (ex: Costco, Sam's Club, BJ's)</td>
<td>40%</td>
<td>40%</td>
<td>10%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>At a convenience store (ex: 7-Eleven)</td>
<td>40%</td>
<td>40%</td>
<td>10%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>At a farmers’ market</td>
<td>40%</td>
<td>40%</td>
<td>10%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>From an online grocery delivery/pick-up service</td>
<td>40%</td>
<td>40%</td>
<td>10%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>At a drug store (ex: CVS, Walgreens)</td>
<td>40%</td>
<td>40%</td>
<td>10%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>From a meal kit delivery service</td>
<td>40%</td>
<td>40%</td>
<td>10%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
</tbody>
</table>

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

83% Use online grocery services less than once a month

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

- You are just more comfortable shopping in-person
- The cost of these services
- Concern about quality/freshness
- Don’t know enough about these services
- It is hard to have things delivered to your home
- Concern about safety of ingredients
- Concern about healthfulness of the food
- The options available are too limited
- These services create too much packaging waste
- Other
- None of these apply

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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