

Survey of Consumers' Attitudes and Perceptions of Environmentally Sustainable and Healthy Diets

IFIC Foundation
July 2019



BACKGROUND

SURVEY METHODOLOGY:

1,000 interviews were conducted AMONG adults 18+ from June 11-12, 2019 and were weighted to ensure proportional results.

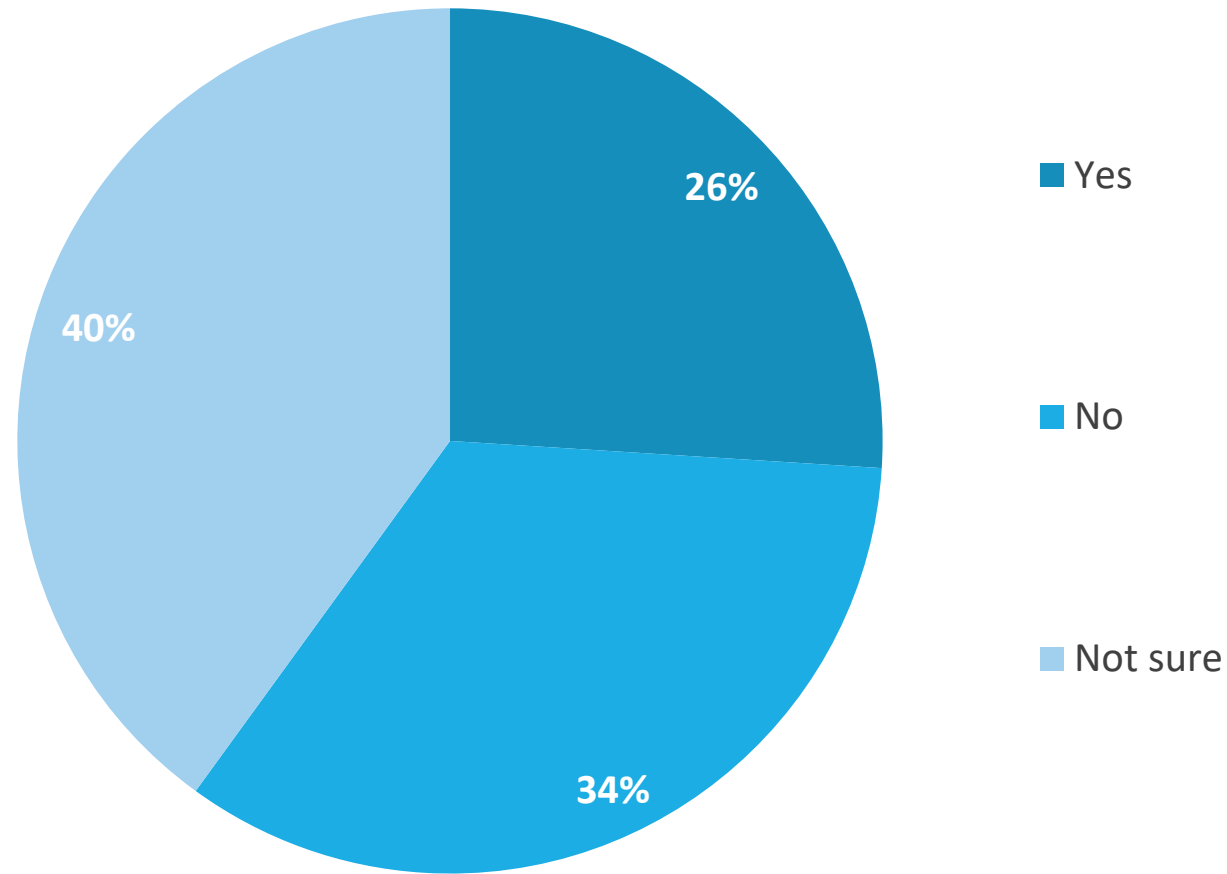
The Bayesian confidence level for 1,000 interviews is 3.5, which is roughly equivalent to a margin of error ± 3.1 at the 95% confidence level.

DEFINITIONS:

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

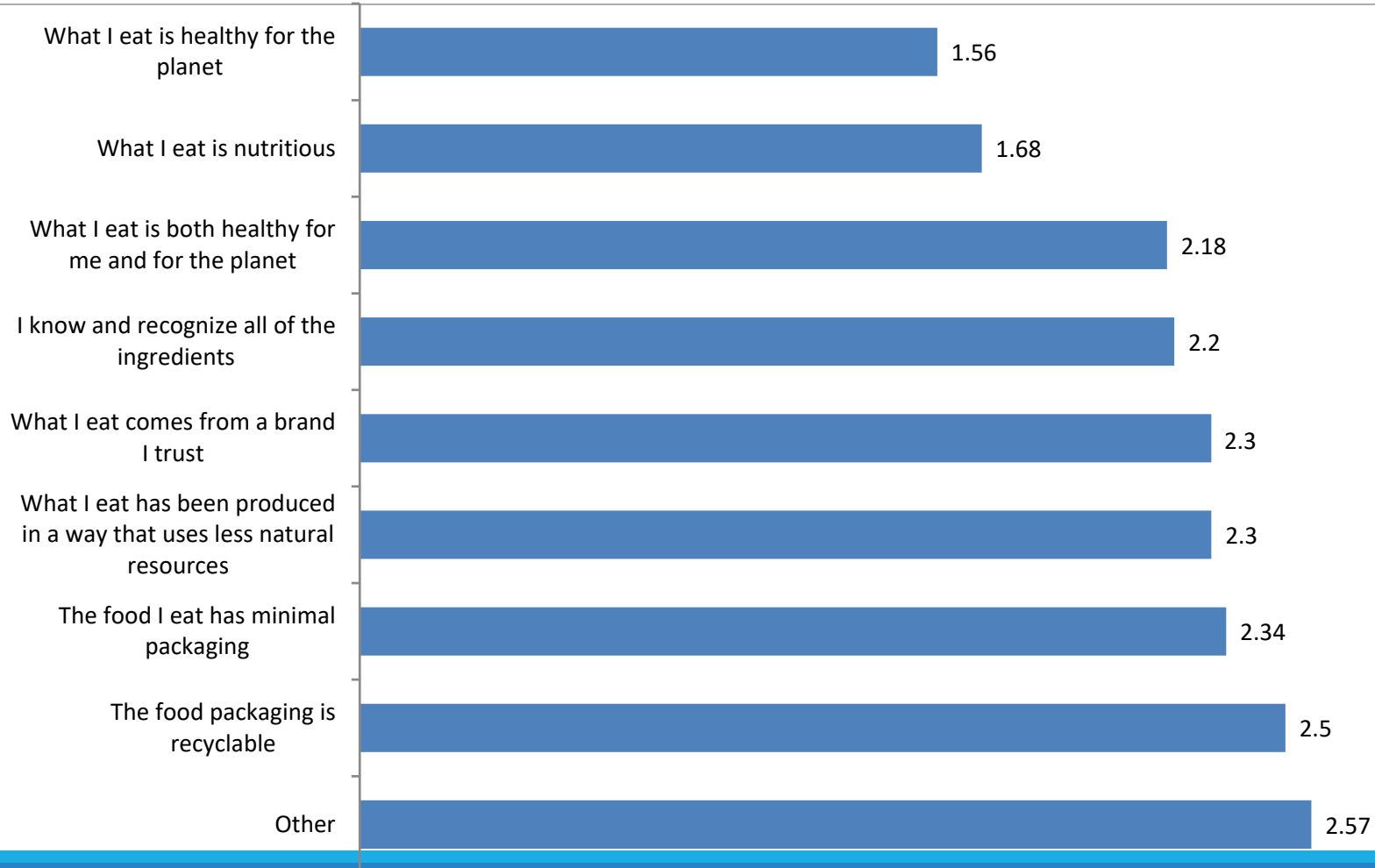
For example, if the responses from female respondents is considered to be significant, it is in relation to male respondents and not necessarily other demographic groups.

CONSIDERABLE NUMBER OF CONSUMERS UNSURE ABOUT DEFINING AN ENVIRONMENTALLY SUSTAINABLE DIET



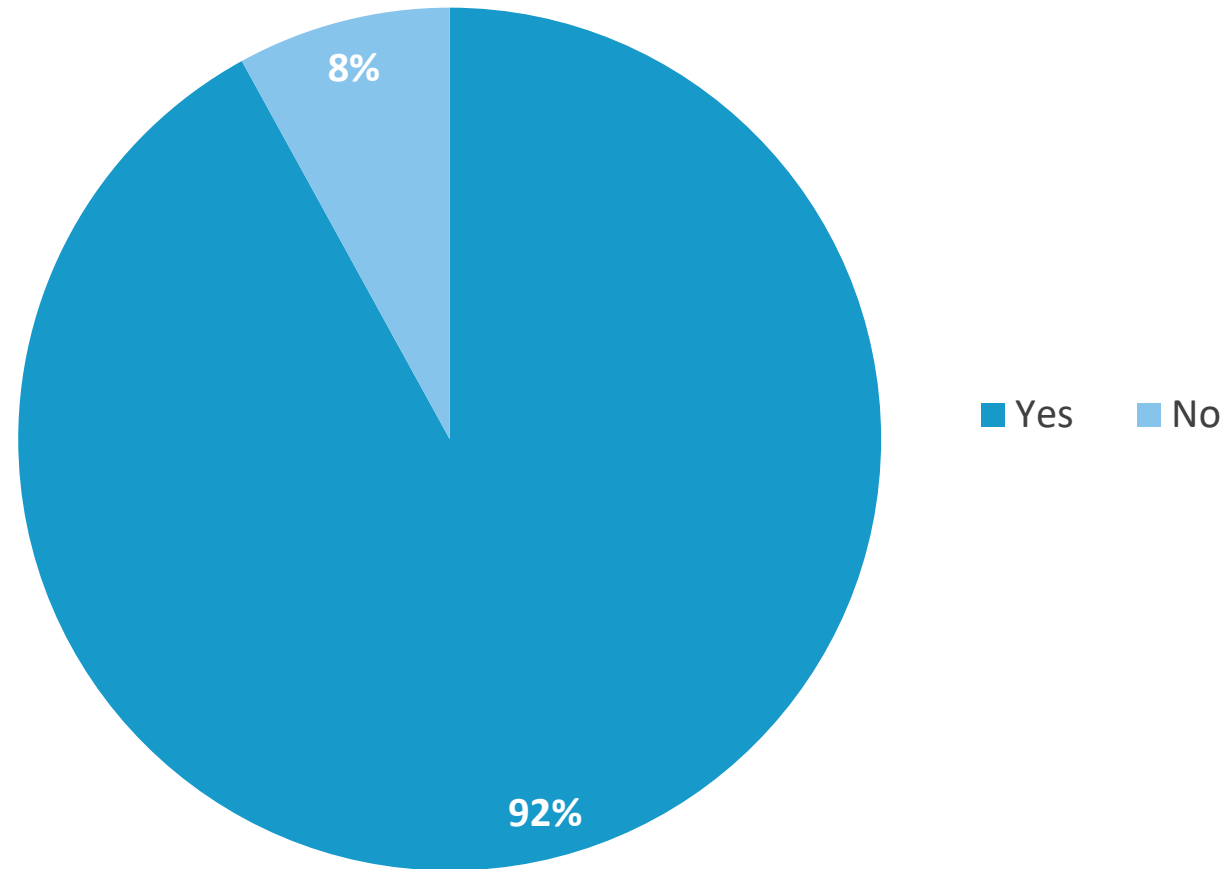
Q1. Do you consider a sustainable diet the same as an environmentally sustainable diet?

CONSUMERS VALUE THE PLANET AND THEIR HEALTH



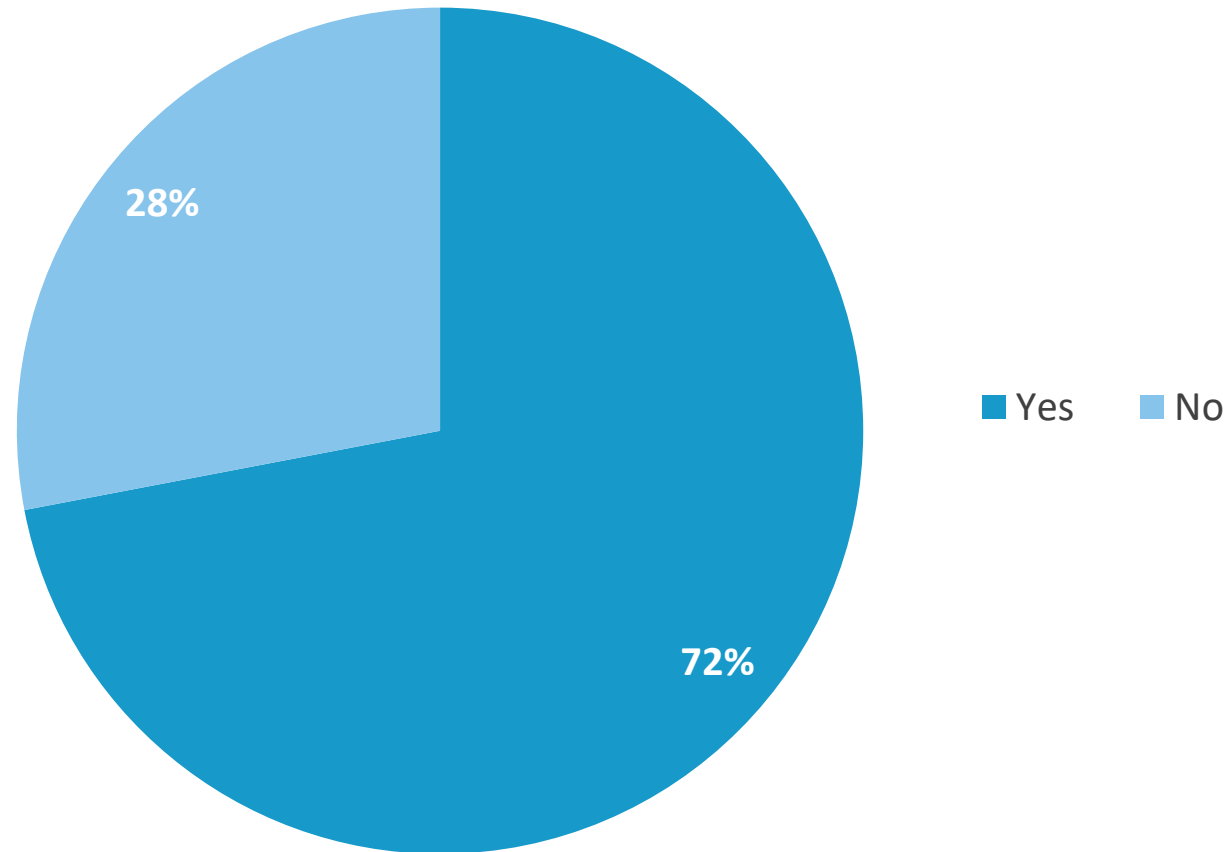
Q2. What aspects of an environmentally sustainable diet are important to you? Please rank your top three choices with 1 being the highest priority and 3 being the lowest.

MOST CONSUMERS EAT PROTEIN FROM ANIMAL SOURCES



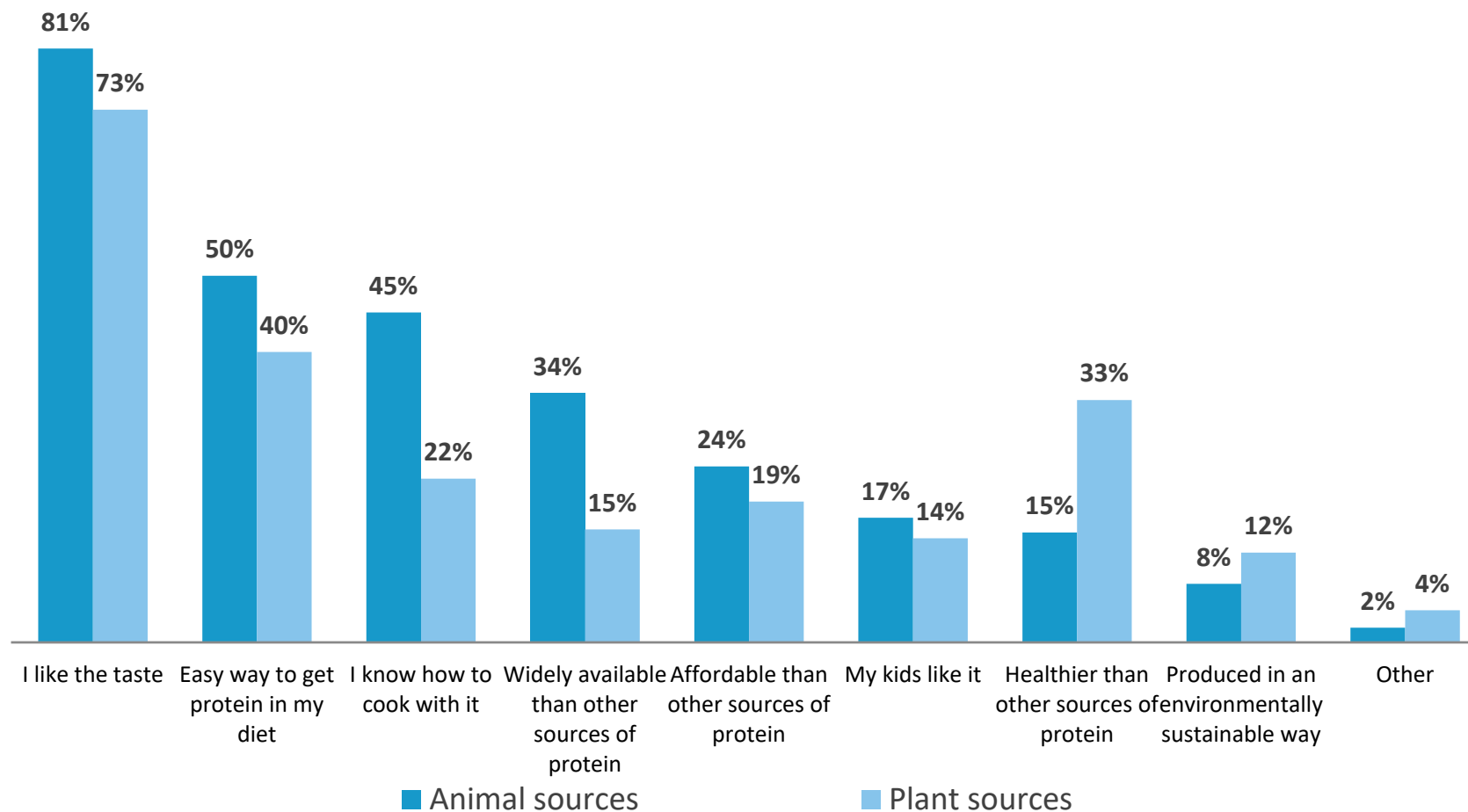
Q3. Do you consume protein from animal sources (for example: poultry, pork, beef, lamb, cow's milk, eggs, or seafood)?

NEARLY THREE-QUARTERS OF CONSUMERS EAT PROTEIN FROM PLANT-BASED SOURCES



Q5. Do you consume protein from plant-based sources (for example: tofu, soy milk, beans, tempeh, nuts, seeds, legumes)?

MAJORITY CHOOSING PROTEIN BASED ON TASTE

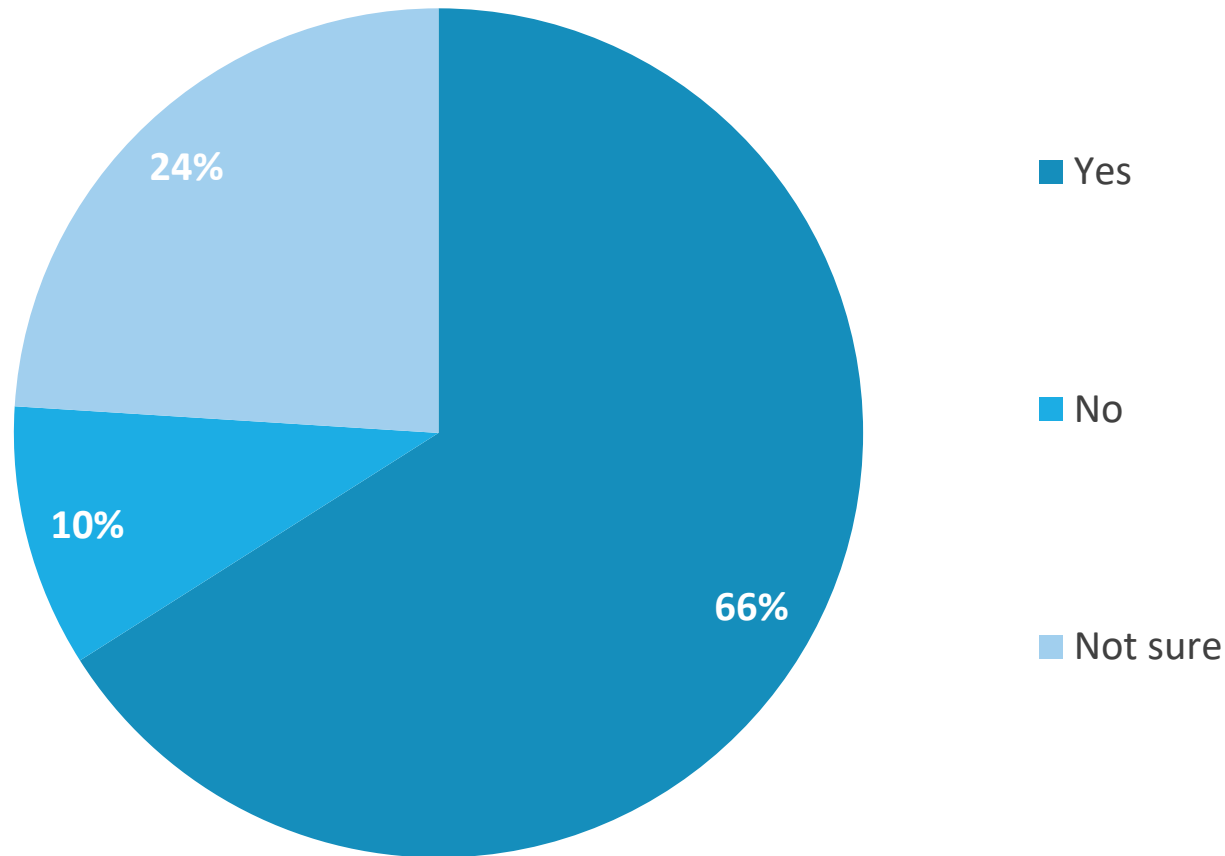


If consume...

Q4. Why do you choose to consume protein from animal sources?

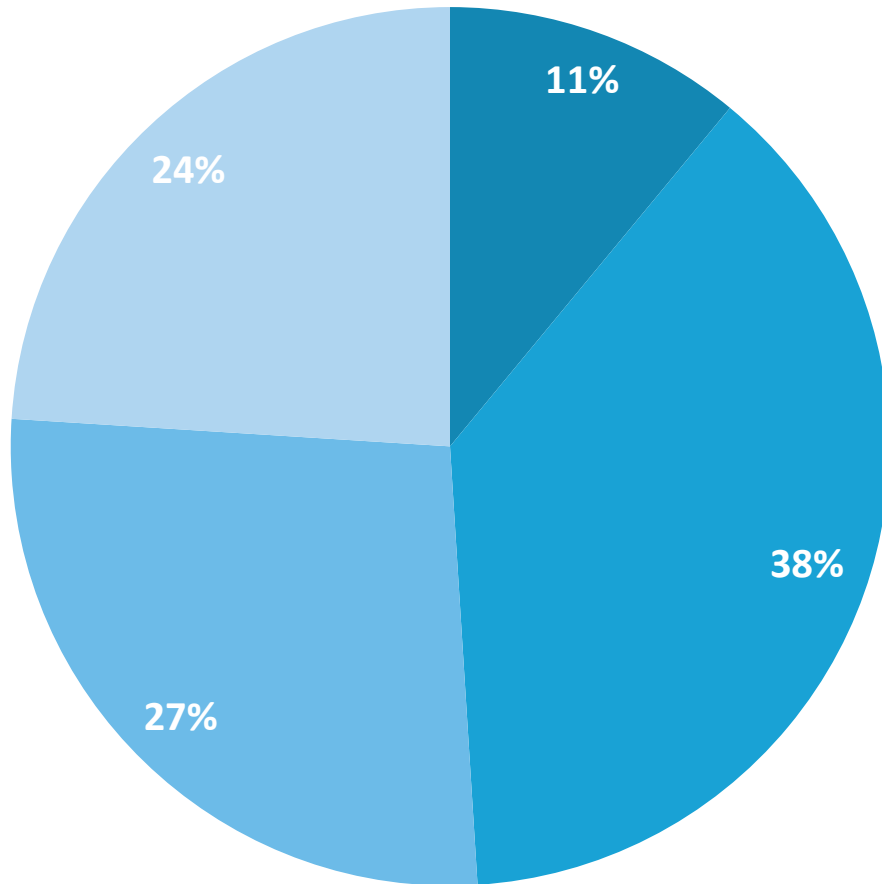
Q6. Why do you choose to consume protein from plant-based sources?

MOST BELIEVE PROTEIN FROM ANIMAL AND PLANT-BASED SOURCES ARE OKAY FOR ENVIRONMENTALLY SUSTAINABLE DIETS



Q7. Do you think an environmentally sustainable diet can include both protein from animal sources (for example: poultry, pork, beef, lamb, cow's milk, eggs or seafood) and protein from plant-based sources (for example: tofu, soy milk, beans, tempeh, nuts, seeds, legumes)?

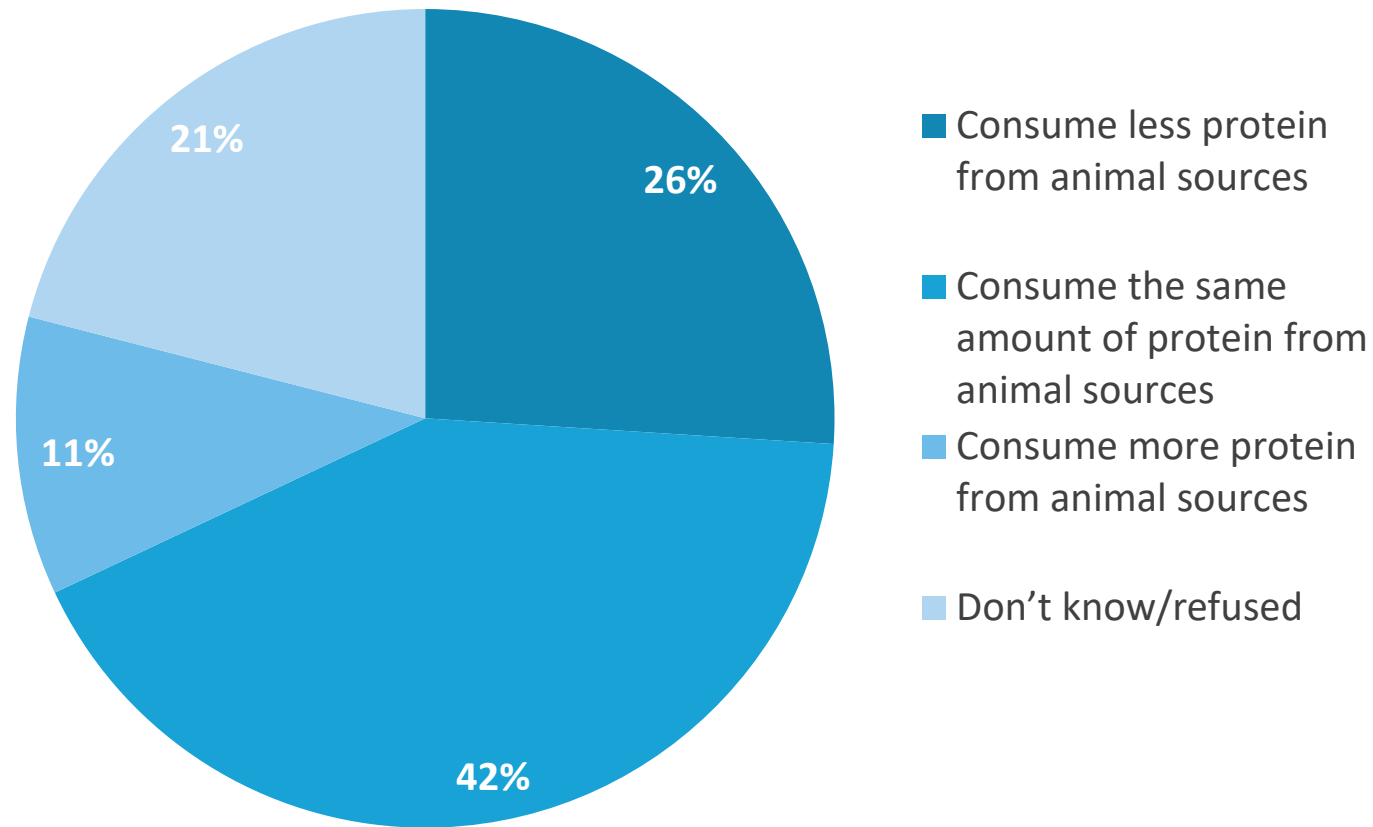
TO EAT IN AN ENVIRONMENTALLY SUSTAINABLE WAY, OVER ONE-QUARTER THINK THEY SHOULD CONSUME MORE PROTEIN FROM PLANT-BASED SOURCES



- Consume less protein from plant-based sources
- Consume the same amount of protein from plant-based sources
- Consume more protein from plant-based sources
- Don't know/ refused

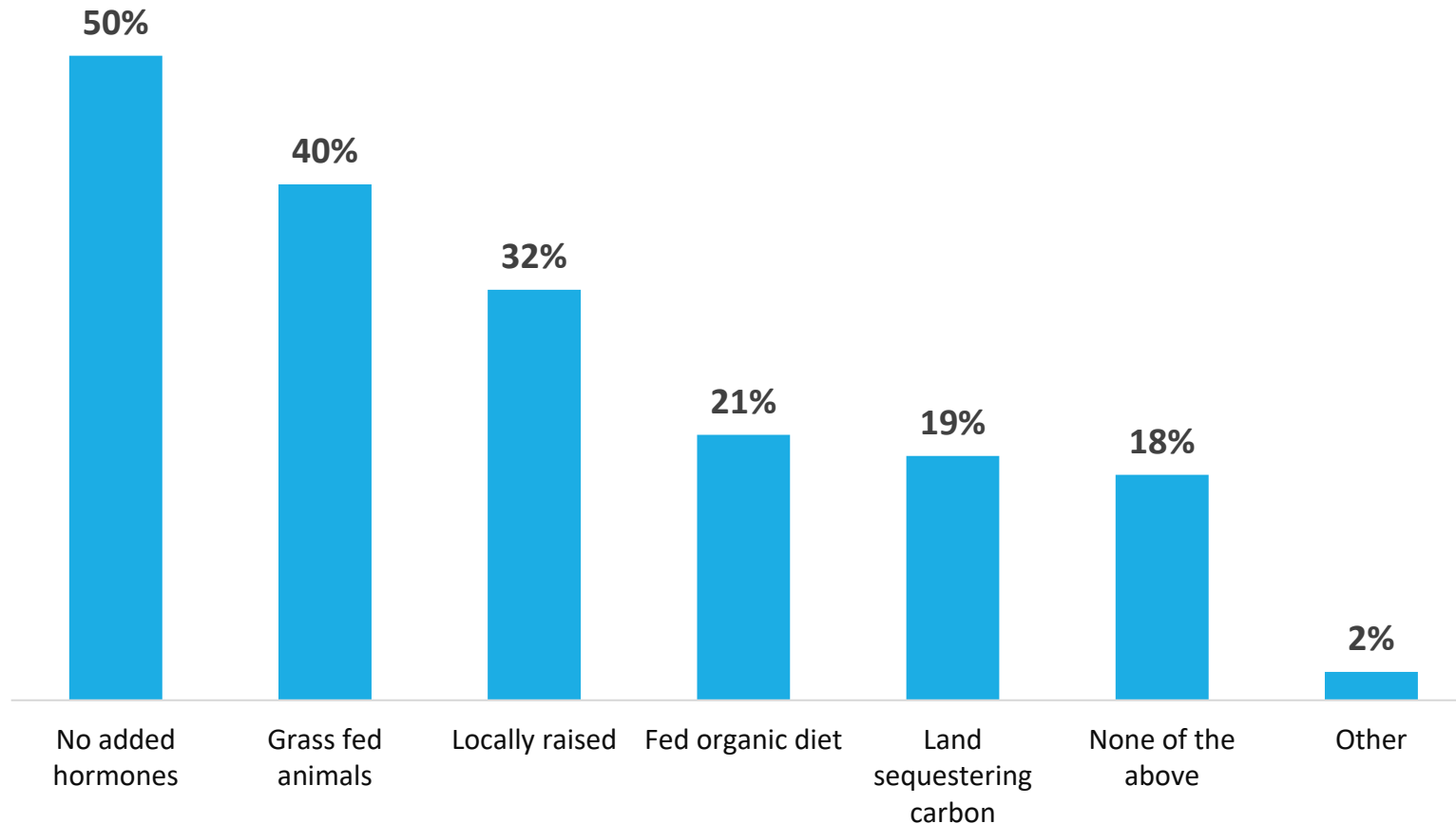
Q8. Thinking ahead to the next few months, to eat both an environmentally sustainable and healthy diet, do you think you need to:

TO EAT IN AN ENVIRONMENTALLY SUSTAINABLE WAY, OVER HALF THINK THEY SHOULD CONSUME THE SAME OR MORE PROTEIN FROM ANIMAL SOURCES



Q9. Thinking ahead to the next few months, to eat both an environmentally sustainable and healthy diet, do you think you need to:

CONSUMERS LINK HEALTH AND SAFETY CONCERNS WITH SUSTAINABILITY: HALF SAY NO ADDED HORMONES LABEL SIGNALS ENVIRONMENTALLY SUSTAINABLE ANIMAL PROTEIN



Q10. What comes to mind when you think of environmentally sustainable animal protein? Please select your top two.



APPENDICES DEMOGRAPHIC SNAPSHOTS

BREAKOUT: COMPARING SUSTAINABLE AND ENVIRONMENTALLY SUSTAINABLE DIETS

	Yes	No	Not sure
Total	26%	34%	40%
Men	28%	37%	35% ↓
Women	23%	31%	46% ↑
White	22% ↓	35%	44% ↑
African American	24%	40%	36%
Hispanic/Latinx	34%	31%	35%
Northeast	28%	28%	44%
Midwest	20%	38%	42%
South	24%	36%	40%
West	31%	34%	35%
Under 45	35% ↑	34%	31% ↓
45-64	19% ↓	33%	47% ↑
65 and over	13% ↓	35%	52% ↑
Non-College	22% ↓	35%	43%
College	31% ↑	33%	36%

Q1. Do you consider a sustainable diet the same as an environmentally sustainable diet?

BREAKOUT: IMPORTANT ASPECTS OF AN ENVIRONMENTALLY SUSTAINABLE DIET

	Healthy for the planet	Nutritious	Healthy for me and the planet	Minimal packing	Few natural resources	Trusted brands	Know listed ingredient	Package is recyclable
Total	12%	16%	9%	3%	5%	3%	4%	1%
Men	15%↑	18%	8%	4%	4%	3%	2%	2%
Women	8%↓	14%	10%	2%	5%	2%	5%	0%
White	10%	12%↓	8%	3%	3%	3%	3%	0%
African American	11%	18%	4%	3%	5%	2%	3%	1%
Hispanic/Latinx	19%	22%	10%	2%	6%	3%	2%	2%
Northeast	15%	17%	8%	2%	6%	1%	4%	2%
Midwest	5%↓	12%	8%	3%	4%	4%	2%	0%
South	9%	14%	9%	3%	4%	3%	4%	1%
West	17%↑	18%	10%	3%	5%	2%	5%	1%
Under 45	17%↑	22%↑	10%	5%↑	5%	5%	4%	2%
45-64	8%	11%	9%	2%	4%	1%	3%	0%
65 and over	3%↓	7%	6%	0%	4%	1%	5%	0%
Non-College	8%↓	13%↓	8%	3%	4%	3%	4%	1%
College	17%↑	20%↑	11%	3%	5%	2%	3%	1%

Q2. What aspects of an environmentally sustainable diet are important to you? Please rank your top three choices, with 1 being the highest priority and 3 being the lowest.

% Ranked 1 and 2

BREAKOUT: PROTEIN FROM ANIMAL SOURCES

	Yes	No
Total	92%	8%
Men	91%	9%
Women	92%	8%
White	95%↑	5%↓
African American	89%	11%
Hispanic/Latinx	89%	11%
Northeast	92%	8%
Midwest	93%	7%
South	93%	7%
West	90%	10%
Under 45	88%↓	12%↑
45-64	94%	6%
65 and over	98%↑	2%↓
Non-College	91%	9%
College	92%	8%

Q3. Do you consume protein from animal sources (for example: poultry, pork, beef, lamb, cow's milk, eggs, or seafood)?

BREAKOUT: PROTEIN FROM PLANT-BASED SOURCES

	Yes	No
Total	72%	28%
Men	70%	30%
Women	73%	27%
White	72%	28%
African American	70%	30%
Hispanic/Latinx	69%	31%
Northeast	74%	26%
Midwest	70%	30%
South	68%	32%
West	73%	27%
Under 45	71%	29%
45-64	70%	30%
65 and over	76%	24%
Non-College	66% ↓	34% ↑
College	80% ↑	20% ↓

Q5. Do you consume protein from plant-based sources (for example: tofu, soy milk, beans, tempeh, nuts, seeds, legumes)?

BREAKOUT: REASON FOR CONSUMING ANIMAL PROTEIN

	The taste	Easy way to get protein	I know how to cook it	It's more widely available	It's more affordable	My kids like it	It's healthier	Environmentally sustained	Other
Total	81%	50%	45%	34%	24%	17%	15%	8%	2%
Men	82%	47%	41%	33%	27%	14%	15%	7%	2%
Women	80%	53%	48%	35%	21%	20%	16%	8%	3%
White	83%	52%	48%	34%	23%	17%	17%	9%	2%
African American	71%	37%	33%	32%	17%	11%	6%	9%	7%
Hispanic/Latin x	80%	46%	40%	38%	29%	22%	14%	1%	1%
Northeast	80%	53%	42%	38%	24%	15%	14%	8%	3%
Midwest	84%	48%	45%	35%	26%	18%	15%	8%	2%
South	79%	48%	49%	31%	26%	18%	18%	8%	3%
West	81%	51%	43%	32%	20%	17%	15%	7%	2%
Under 45	81%	47%	41%	37%	26%	25%↑	13%	5%	3%
45-64	79%	51%	46%	31%	23%	14%	17%	9%	1%
65 and over	84%	55%	51%	34%	21%	3%↓	19%	11%	2%
Non-College	78%	49%	48%	34%	24%	14%	16%	8%	3%
College	85%	51%	40%	34%	25%	22%	14%	6%	1%

If consume...

Q4. Why do you choose to consume protein from animal sources?

BREAKOUT: REASON FOR CONSUMING PLANT-BASED PROTEINS

	The taste	Easy way to get protein	It's healthier	I know how to cook it	It's more affordable	It's widely available	My kids like it	Environmentally sustained	Other
Total	73%	40%	33%	22%	19%	15%	14%	12%	4%
Men	70%	38%	33%	24%	21%	18%	14%	10%	3%
Women	75%	41%	33%	21%	18%	14%	14%	14%	6%
White	76%	41%	34%	20%	17%	13%	13%	12%	4%
African American	63%	32%	30%	29%	26%	23%	9%	8%	5%
Hispanic/Latinx	72%	42%	24%	21%	21%	14%	24%	15%	4%
Northeast	71%	45%	35%	24%	22%	19%	14%	15%	7%
Midwest	76%	36%	34%	17%	13%	14%	9%	12%	5%
South	73%	39%	32%	26%	23%	18%	15%	12%	2%
West	71%	39%	31%	23%	20%	12%	18%	10%	3%
Under 45	68%	36%	32%	24%	19%	17%	20%↑	13%	5%
45-64	76%	42%	32%	21%	18%	12%	11%	12%	3%
65 and over	77%	43%	37%	20%	22%	18%	4%	11%	5%
Non-College	71%	37%	35%	22%	19%	19%	11%	14%	5%
College	75%	43%	30%	22%	19%	12%	18%	10%	4%

If consume...

Q6. Why do you choose to consume protein from plant-based sources?

BREAKOUT: SUSTAINABLE DIET FROM BOTH ANIMALS AND PLANTS

	Yes	No	Not sure
Total	66%	10%	24%
Men	68%	11%	21%
Women	64%	9%	26%
White	68%	8%	24%
African American	59%	14%	27%
Hispanic/Latinx	65%	12%	23%
Northeast	65%	11%	24%
Midwest	68%	10%	22%
South	66%	8%	26%
West	67%	11%	22%
Under 45	68%	14%↑	18%↓
45-64	63%	9%	28%
65 and over	67%	3%↓	31%
Non-College	62%↓	11%	27%↑
College	73%↑	9%	19%↓

Q7. Do you think an environmentally sustainable diet can include both protein from animal sources (for example: poultry, pork, beef, lamb, cow's milk, eggs or seafood) and protein from plant-based sources (for example: tofu, soy milk, beans, tempeh, nuts, seeds, legumes)?

BREAKOUT: PROTEIN FROM PLANT-BASED SOURCES

	Consume less protein from plant-based sources	Consume same amount of protein from plant-based sources	Consume more protein from plant-based sources	Don't know/refused
Total	11%	38%	27%	24%
Men	14%	37%	27%	23%
Women	9%	39%	27%	26%
White	10%	37%	27%	25%
African American	14%	36%	29%	21%
Hispanic/Latinx	15%	45%	23%	17%
Northeast	14%	33%	30%	23%
Midwest	9%	40%	28%	23%
South	12%	36%	28%	24%
West	11%	41%	22%	26%
Under 45	16%↑	39%	26%	19%↓
45-64	7%	39%	26%	28%
65 and over	7%	34%	29%	30%
Non-College	10%	35%	27%	28%↑
College	13%	42%	26%	18%↓

Q8. Thinking ahead to the next few months, to eat both an environmentally sustainable and healthy diet, do you think you need to:

BREAKOUT: PROTEIN FROM ANIMAL SOURCES

	Consume less protein from animal sources	Consume same amount of protein from animal sources	Consume more protein from animal sources	Don't know/refused
Total	26%	42%	11%	21%
Men	24%	45%	12%	19%
Women	27%	39%	10%	23%
White	25%	45%	9%	21%
African American	30%	35%	18%	17%
Hispanic/Latinx	27%	41%	15%	16%
Northeast	28%	40%	12%	20%
Midwest	28%	38%	11%	22%
South	26%	45%	11%	19%
West	22%	45%	11%	22%
Under 45	26%	41%	15%↑	18%
45-64	23%	45%	8%	24%
65 and over	32%	40%	5%	24%
Non-College	24%	40%	11%	24%↑
College	29%	44%	11%	16%↓

Q9. Thinking ahead to the next few months, to eat both an environmentally sustainable and healthy diet, do you think you need to:

BREAKOUT: CONSIDERATIONS OF ENVIRONMENTALLY SUSTAINABLE ANIMAL PROTEIN

	No added hormones or antibiotics	Grass fed animals	Locally raised	Animals fed an organic diet	Animals raised on land sequestering carbon	Other	None of the above
Total	50%	40%	32%	21%	19%	2%	18%
Men	44%↓	41%	32%	22%	21%	3%	19%
Women	57%↑	40%	32%	20%	17%	1%	16%
White	52%	42%	32%	17%↓	20%	3%	17%
African American	54%	49%	30%	21%	18%	1%	14%
Hispanic/Latinx	47%	28%	36%	33%↑	22%	2%	16%
Northeast	49%	33%	35%	23%	20%	2%	19%
Midwest	52%	44%	32%	14%	17%	3%	19%
South	53%	44%	32%	20%	21%	2%	14%
West	48%	39%	30%	26%	19%	2%	19%
Under 45	45%↓	35%	34%	24%	21%	2%	19%
45-64	54%	44%	32%	18%	19%	2%	16%
65 and over	59%	46%	27%	16%	13%	3%	18%
Non-College	53%	42%	31%	20%	15%↓	2%	19%
College	46%	38%	34%	22%	25%↑	3%	16%

Q10. What comes to mind when you think of environmentally sustainable animal protein? Please select your top two.

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