2020 FOOD & HEALTH SURVEY

International Food Information Council

Background

This year's Food and Health Survey marks the 15th time the International Food Information Council (IFIC) 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 how food and health behaviors have changed in the past decade (2010-2020) and how health monitoring devices and apps impact habits.

As we are all too aware, the 2020 survey (conducted between April 8 and April 16) also takes place against the backdrop of one of the deadliest and most life-disrupting pandemics in recent world history.

Of course, it cannot be underestimated how impactful this context is on the results of a survey about food and health. While many beliefs and actions on these topics have not shifted in the short-term, the widespread lockdowns of non-essential businesses and activities, the safety precautions we incorporate into our lives, and the new quarantined lifestyle in which we find ourselves is a major disruption to life as normal. As you interpret the results of this report, it is essential that this context be kept in mind as part of the broader setting for how American consumers in 2020 think and act.

Methodology

Online survey of 1,011 Americans ages 18 to 80. Fielding took place between April 8 to April 16, 2020.

The survey took approximately 23 minutes to complete on average.

The results were weighted to ensure that they are reflective of the American population ages 18 to 80, as seen in the 2019 Current Population Survey. Specifically, they were weighted by age, education, gender, race/ethnicity and region.

The survey was conducted by Greenwald & Associates, using Dynata's consumer (formerly the Research Now) panel.

Note: significant changes in trend vs. 2019 (or in some cases 2010) are indicated where appropriate with up and down arrows or call-out boxes.

Executive Summary

The 2020 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 1,011 Americans ages 18 to 80 focuses on:

- How the COVID-19 crisis has impacted food and diet habits
- Views on food safety, especially in the context of the COVID-19 crisis
- Changes in food and health attitudes and behaviors over the past decade
- Food and beverage purchase drivers
- Plant-based foods and eating patterns generally
- The link between food and desired health outcomes
- Beliefs about food production and food technologies

Findings are presented for all respondents. Additional insights are provided based on how findings vary by different types of demographic groups such as by age, race, gender and income.

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

The vast majority of Americans have altered their food habits as a result of the COVID-19 pandemic.

More than 8 in 10 Americans say they have experienced some change to their habits surrounding eating or food preparation. Cooking more at home is, not surprisingly, the biggest change, but many are also snacking more, washing produce more than usual, and thinking about food in general. Consumers under age 35 are most likely to have made changes, both in terms of healthier and less healthy choices.

Grocery shopping is also impacted, naturally. The amount of in-person shopping is down, especially among those in poorer health. Meanwhile, online grocery shopping has increased. That said, the changes have not been entirely drastic – the biggest shift for in-person shopping is that fewer Americans are making multiple trips a week.

The pandemic has significantly changed Americans' concerns and beliefs about food safety, at least for now.

While consumers' top food safety issues have been stable in recent years, this year concerns about food handling and preparation related to the risk of COVID-19 has shot up to the second most important issue for Americans (or the top issue if looking at what people rank as number 1 only). More than a third of Americans also say that they actively avoid foods and beverages as a result of their concerns about the food safety issues.

In addition, roughly half of Americans are concerned about eating food prepared outside the home, whether in a restaurant or delivered. Interestingly, while more than a third of consumers also express concern about shopping for groceries in-person (especially parents), there is still more overall concern with food safety when shopping for groceries online.

The factors that drive food purchasing decisions have remained quite stable over the past decade, but when you ask consumers themselves how their decision-making compares, more than half say healthfulness matters more to them now.

Taste and price are not surprisingly still the top factors for decisions, and while there has been movement year to year in the *degree* to which purchase drivers impact consumers, the comparison of 2010 results to 2020 shows almost no change. Yet, Americans have a different view of themselves and their own evolving purchasing decisions: 54% of all consumers, and 63% of those age 50+, care more about the healthfulness of their choices than they did in 2010. Of course, taste and price are more impactful for 4 in 10 consumers as well, which may account for the lack of overall change in trend, but healthfulness is the biggest mover.

Nearly 6 in 10 Americans also say the emphasis they place on their overall health when making decisions about what to eat and drink has increased, surpassing the emphasis placed simply on one's weight (although not by a lot).

The amount of people who are actively following a diet is up significantly in comparison to 2019.

While there are fewer Americans making general changes to improve the healthfulness of their diet in 2020 vs. what was observed a decade ago, dieting is up vs. 2019. 43% of Americans followed a specific diet or eating pattern in the last year (up from 38% in 2019 and 36% in 2018), with intermittent fasting taking the lead as most common. Clean eating, last year's top diet, has dropped to 2nd place.

Nearly 3 in 4 judge their own diet to be healthier than that of the average American.

On a scale of 0 to 100, where 100 represents an excellent diet, consumers give themselves an average score of 59 and give the “average American” a score of 42. Overall, 73% rank their own score higher than the average American and only about 1 in 6 see themselves as below average. This view may be why consumers also see the biggest changes in the average American’s diet over the past decade as being an increase in fast food/eating out and an increase in consumption of processed foods.

Familiarity with the government’s Dietary Guidelines for Americans has increased dramatically since 2010.

In 2010, only 23% of Americans said they knew at least a fair amount about the Dietary Guidelines. This year, 41% said the same, an increase of 18 percentage points. Unfortunately, there is a huge gap in awareness by health status: 49% in excellent/very good health know at least a fair amount about the Guidelines vs. just 29% who are in poorer health. Related to the increase in familiarity with the Dietary Guidelines, familiarity with the MyPlate graphic has also increased vs. 2019.

Nearly 1 in 5 Americans are using a mobile health monitoring device or app, and two-thirds of those who are say it has led them to make healthy changes in their life.

18% of consumers are using some sort of health monitoring device or app, whether it be related to diet/food consumption, exercise/physical activity, or their overall health. It is more common amongst women, parents, those with higher income and education, those in urban areas, and those following a diet. Of those using one, nearly all feel more aware of their health status, with 45% saying it helps greatly. And 66% say it has led to healthy changes they otherwise wouldn't have made.

A quarter of Americans snack multiple time a day and nearly 4 in 10 at least occasionally replace meals by snacking.

Consistent with 2019, 26% say they snack multiple times a day and another third snack at least daily. Most often, snacking happens because people simply feel hungry or thirsty, but the 2nd most common reason is snacks are viewed as a treat for themselves. 38% say they at least occasionally replace meals by snacking (lunch being the meal most often replaced) and another quarter of Americans sometimes skip meals entirely.

Consumption of protein from plant sources and plant-based meat and dairy alternatives have increased in the past year.

According to consumers reflecting on their own habits over the past year, 28% are eating more protein from plant sources, 24% are eating more plant-based dairy, and 17% are eating more plant-based meat alternatives. Those following a specific diet or eating pattern are huge drivers of these numbers: 41% of dieters say they increased consumption of protein from plant sources (vs. 18% of those not following a diet) and 28% say they eat more plant-based meat alternatives (vs. just 9%).

Fewer Americans are trying to limit or avoid sugars in 2020, although this is still very common.

Three-quarters of consumers (74%) are trying to limit/avoid sugars in their diet this year, which falls slightly from the 80% doing so in 2019. The most common tactic for those who are trying to limit/avoid sugars remains opting for water instead of caloric beverages. That said, there has been no change to consumers' overall preferences for sugars vs. low-/no-calorie sweeteners vs. using neither.

Half of Americans say that whether a food is processed impacts their purchasing decision, a factor that has gained traction over the past decade.

49% of consumers say that whether they consider a product to be processed is a factor in their decision to buy foods and beverages, landing it just below convenience but ahead of environmental sustainability in terms of considerations. More than 4 in 10 also say that the importance of this factor has increased for them personally over the past decade.

Although the overall perceived importance of environmental sustainability has remained stable, there has been an uptick in the impact of this factor on purchase decisions.

Nearly 6 in 10 consumers say it is important that the food products they purchase or consume are produced in an environmentally sustainable way (similar to the 54% who said the same in 2019). 43% also say it is important that a food manufacturer "has a commitment" to sustainability and 40% say the same about knowing food was produced using farming technologies that seek to reduce the impact on natural resources.

Most critically, the share who say environmental sustainability has a real impact on their purchases is up from 27% in 2019 to 34%. Yet, it remains difficult for many consumers to truly know whether their choices are in fact supportive of sustainability. "Sustainably sourced" labels and recyclable packaging are common signals for this, but over 6 in 10 find it hard to know whether their food choices are environmentally sustainable. Of those who agree with this sustainability confusion, 7 in 10 say it would influence their decisions more if it was easier to know.

More than 4 in 10 consumers would assume that a product that is described as plant-based would be healthier than one that is not, even if it had the exact same Nutrition Facts label.

When asked about a hypothetical comparison of two food products with the same Nutrition Facts label, 43% say the one that is "plant-based" would likely be healthier. This ranks just below "all natural," which 44% of consumers believe would be healthier than the alternative, even with the same nutritional information on the packaging.

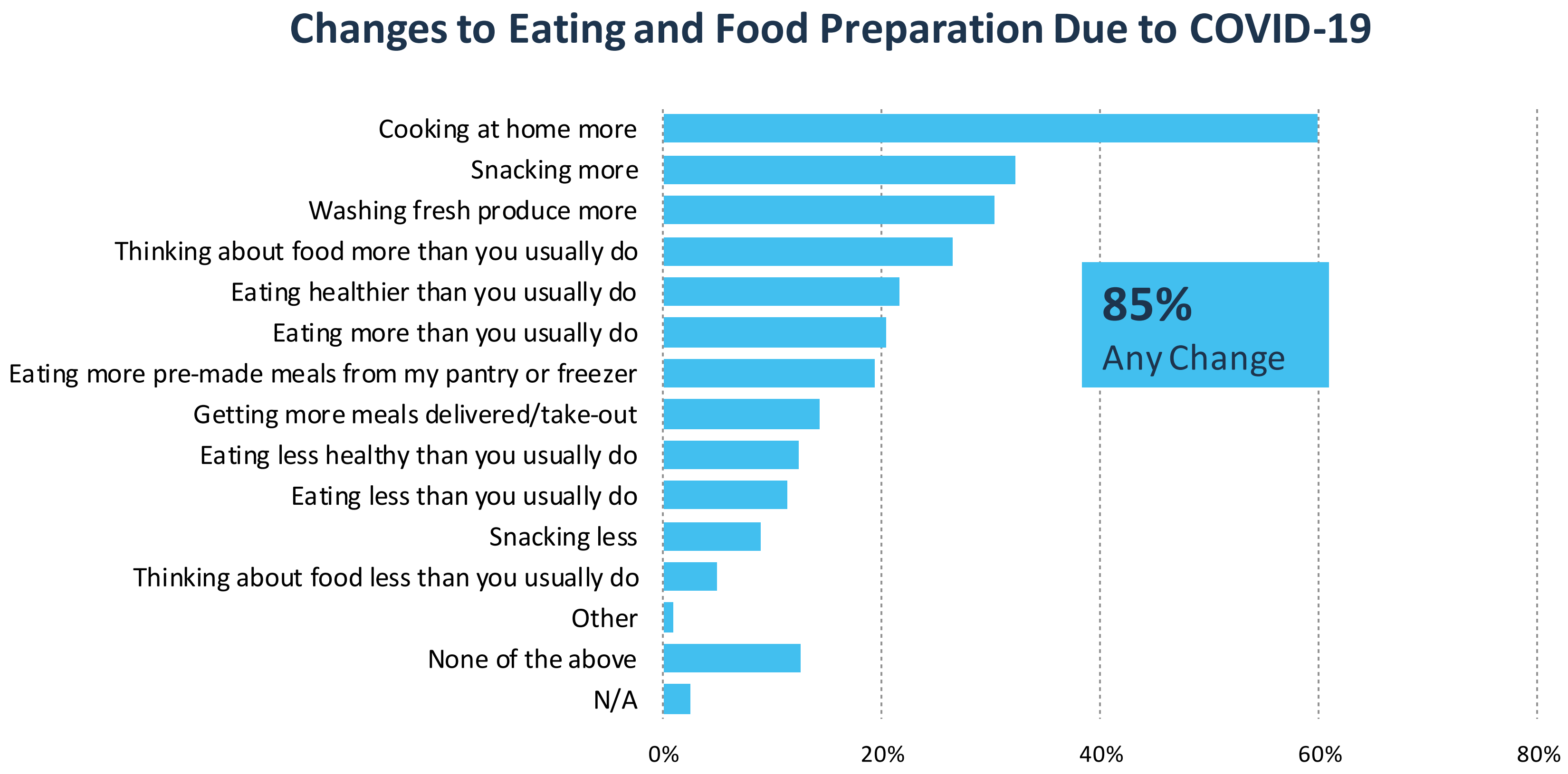
Caffeine consumption differs by gender and for those with and without children.

Not surprisingly, caffeine is consumed most often when people wake up or with breakfast. Men are much more likely than women to consume caffeine with breakfast, while parents are much more likely to need caffeine with lunch in comparison to those without children.

The COVID-19 Pandemic & Americans’ Food Behaviors

More than 8 in 10 Americans have altered their food habits as a result of the COVID-19 pandemic

Women, those under age 35, and parents are among some of the most likely to have made changes



41% of consumers under 35 say they are snacking more than normal (vs. 26% who are age 50+). Younger consumers are also more likely to have changed their behavior in many of these ways, both in terms of healthy and less healthy choices.

41% of parents with children under 18 are snacking more (vs. 29% without children)

Women are more likely than men to report that they are thinking about food more than usual (31% vs. 22%) and eating more than usual (24% vs. 17%)

Q13b: Has there been any change to food you eat or how you prepare food as a result of the coronavirus (COVID-19) crisis? Select all that apply. (n=1,011)

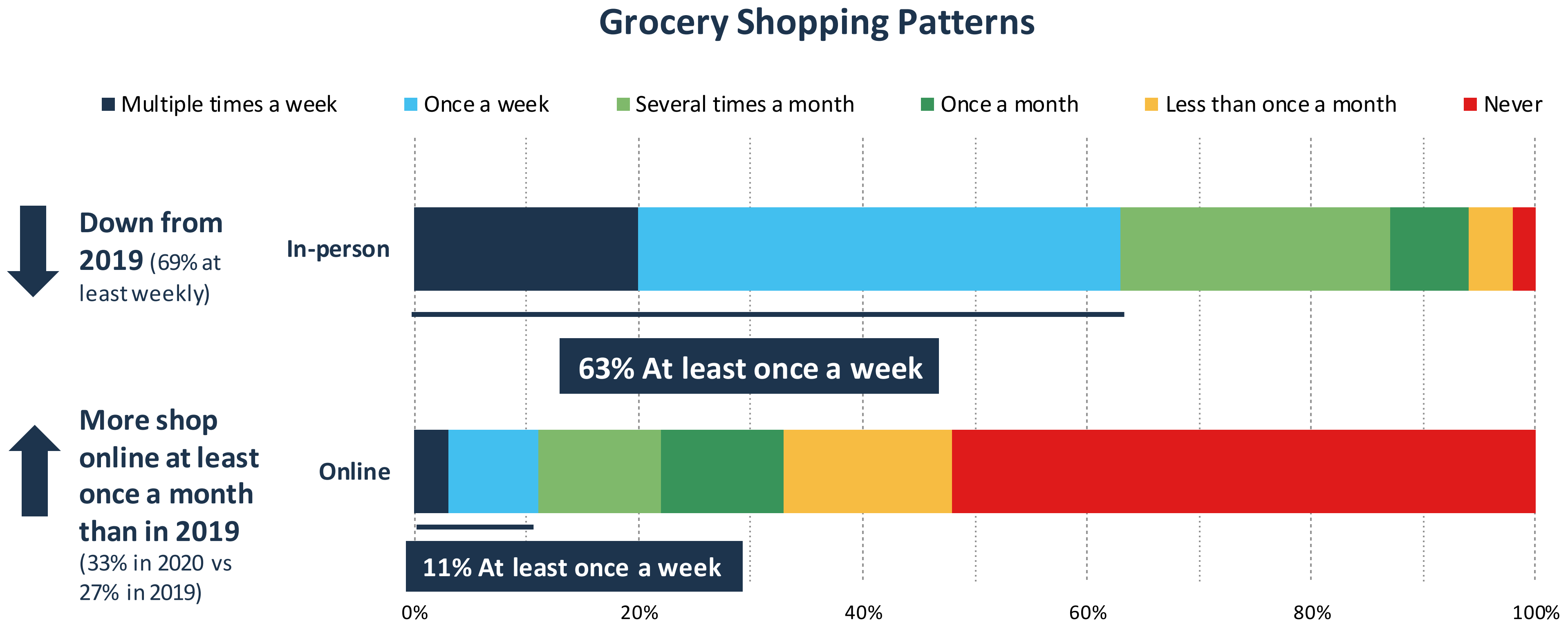
In-person shopping is down, online shopping is up, but overall shopping patterns have not changed drastically

The decrease in in-person shopping is from those making multiple trips in a week (down from 28% to 20%); those in poorer health are much less likely to be making regular in-person trips

67% of consumers in very good health grocery shop in person at least once a week (vs. 50% in fair/poor health)

20% of consumers with children <18 years grocery shop online at least once a week (vs. 8% of consumers without children <18)

45% of consumers who have tried a diet in the past year grocery shop online at least once a month (vs. 24% who haven't)

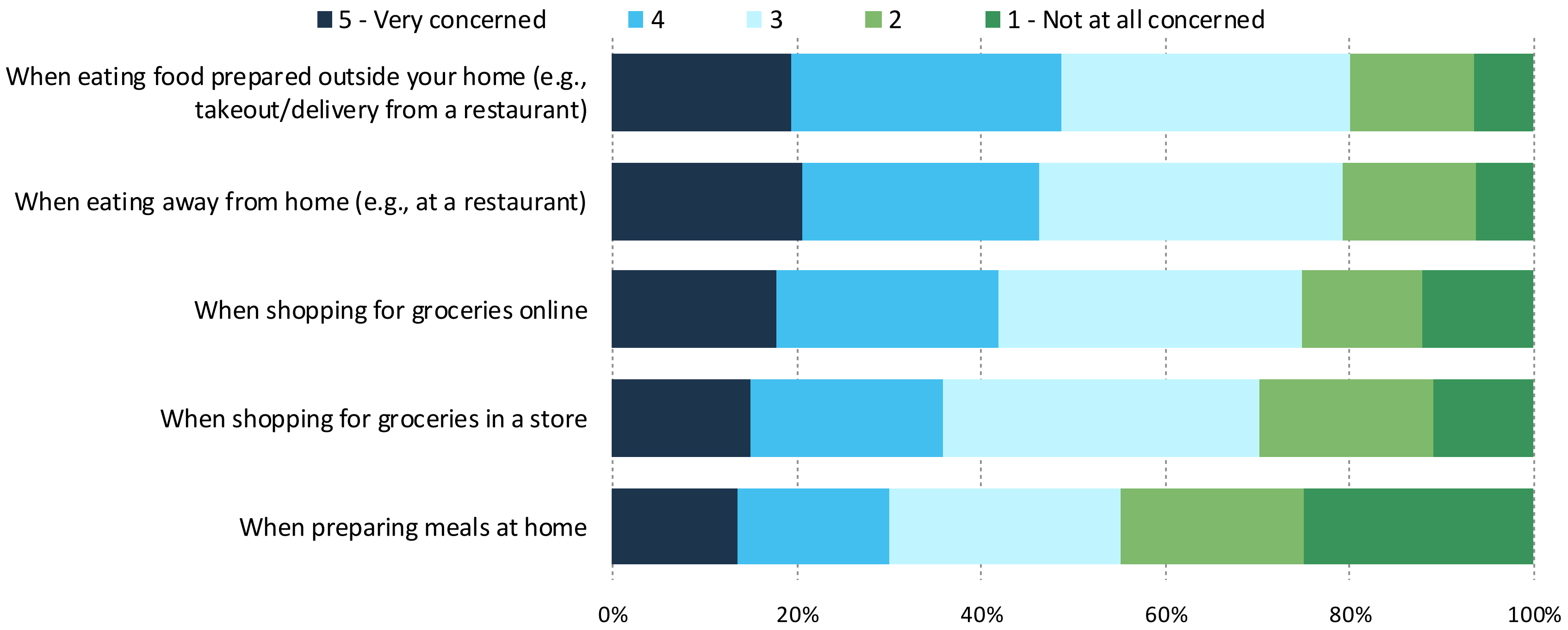


Q13 (TREND): How often do you buy groceries…? (n=1,011)

In the context of the pandemic, roughly half are at least somewhat concerned about eating food prepared outside the home

Food safety concern is still greater for online grocery shopping than it is for in-person

How Context Impacts Concern



Q55: How concerned are you about food safety in each of the following contexts? (n=1,011)

53% of consumers who grocery shop online at least once a month are concerned about food prepared outside their home (vs. 43% who never do). Similarly, 41% are concerned about in-person grocery shopping (vs. 31%).

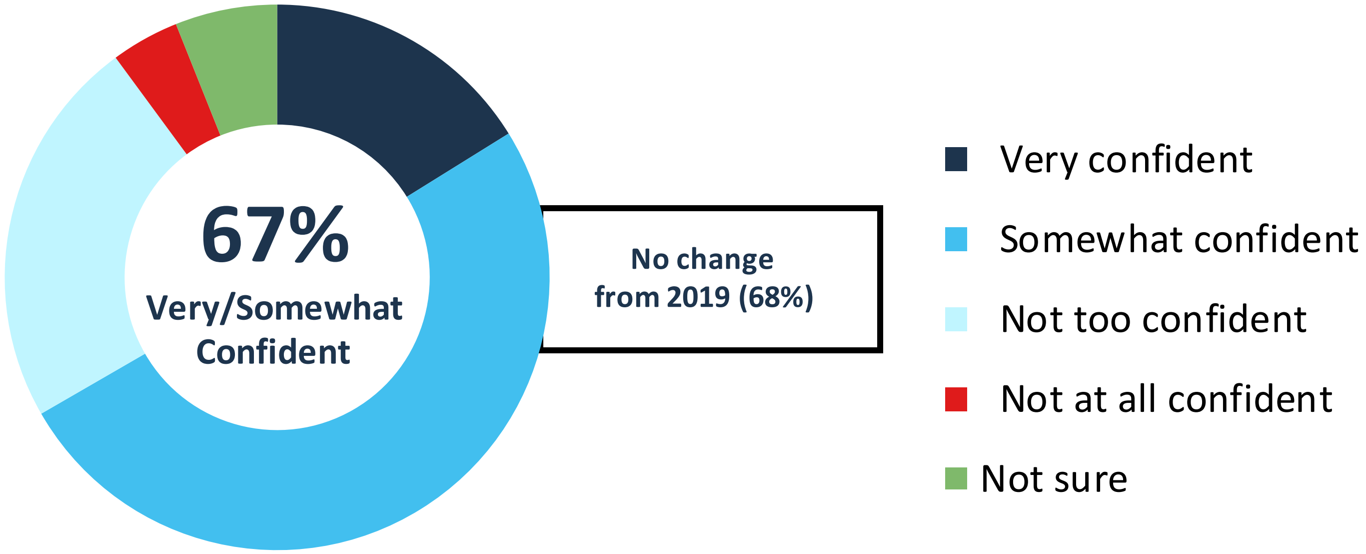
56% and 55% of Hispanic and African American consumers, respectively, are concerned about eating away from the home (vs. 43% of non-Hispanic whites)

43% of parents with children under 18 are concerned about in-person grocery shopping (vs. 33% of those without children)

Despite COVID-19, nearly 7 in 10 are at least somewhat confident in the safety of the U.S. food supply

Those in very good health, those with a spouse/partner, and older consumers are more likely than their counterparts to be confident in the U.S. food supply

Confidence in the Safety of the U.S. Food Supply



72% of consumers who are in excellent/very good health are confident (vs. 60% in fair/poor health)

74% of those with a spouse/partner are confident (vs. 59% of single consumers)

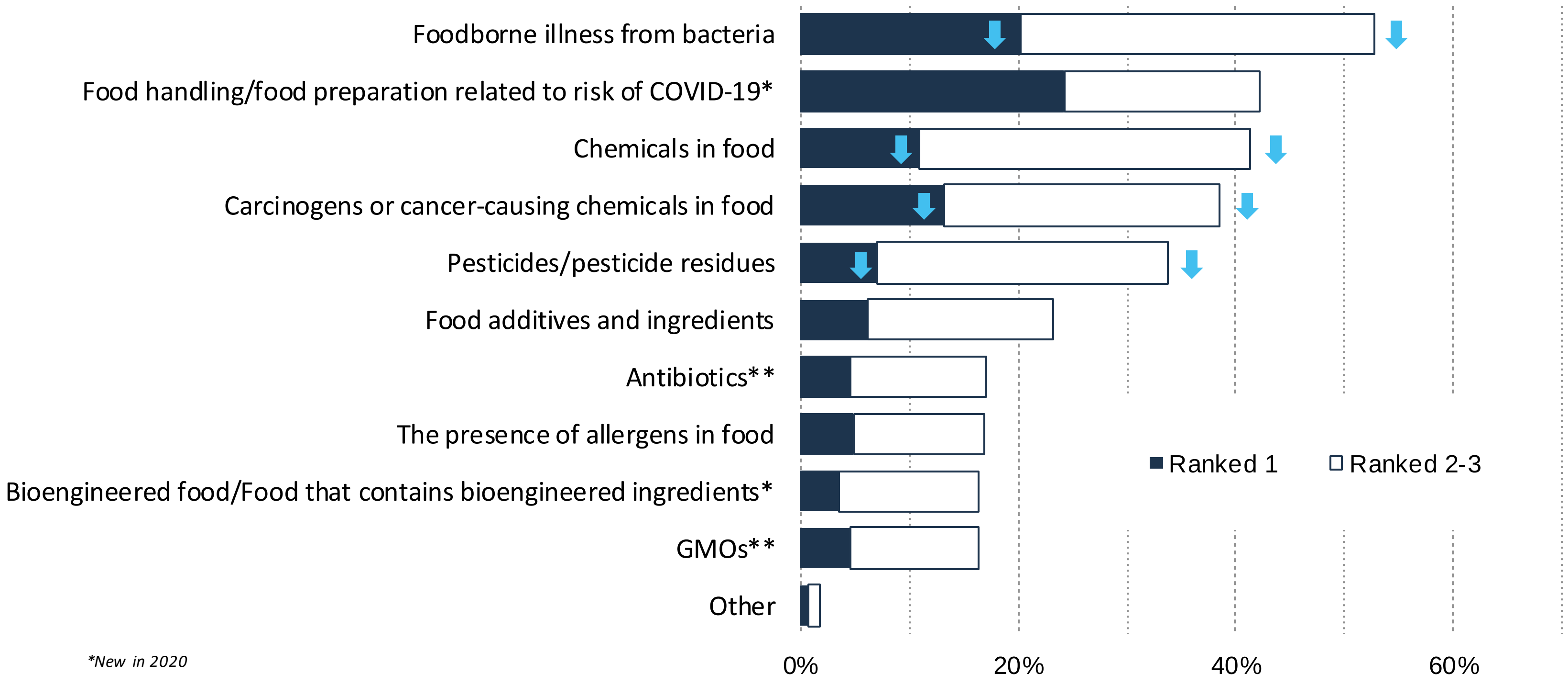
72% of those age 65+ are confident (vs. 56% of those under age 35)

Q54 (TREND): Overall, how confident are you in the safety of the U.S. food supply? (n=1,011)

The top 4 food safety issues in 2019 have all decreased, due to the rise in concerns related to COVID-19

More than a third of consumers avoid certain foods/beverages due to their top food safety issue

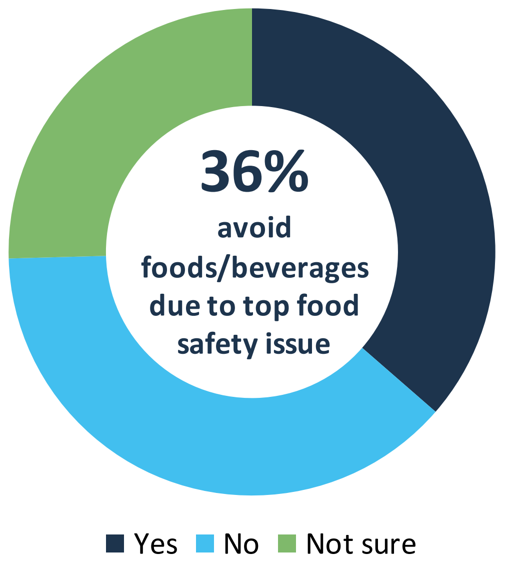
Most Important Food Safety Issues Today



*New in 2020

**Revised in 2020

Avoidance of Foods/Beverages Due to Top Food Safety Issue



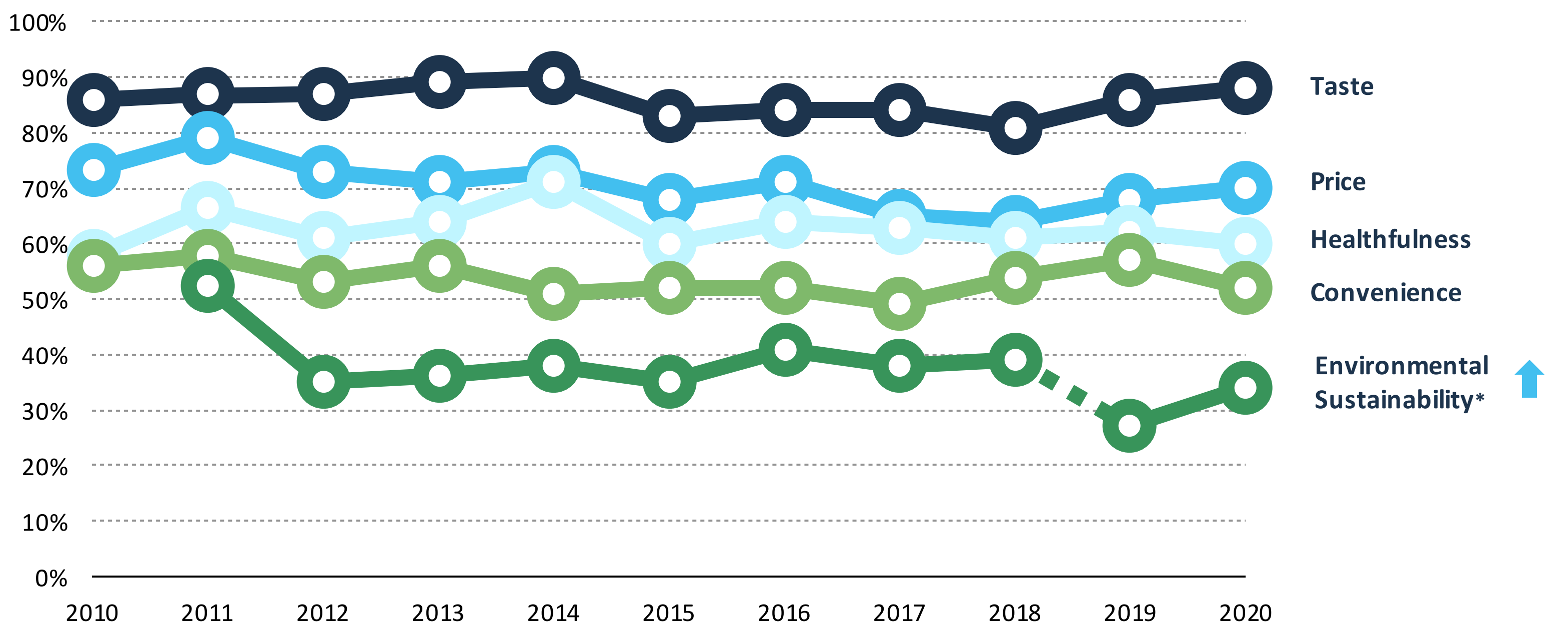
Q56 (REVISED TREND): What in your opinion are the three most important food safety issues today? Please rank from 1 to 3, with 1=Most Important. (n=1,011)
Q57: In the previous question, you identified [INSERT TOP CONCERN] as your #1 food safety issue today. Do you ever avoid specific foods and/or beverages when shopping because of this concern? (n=1,011)

Changes in the Past Decade

The drivers of purchase decisions have remained largely stable since 2010, with taste and price still on top

The importance of environmental sustainability as a purchase driver has increased since 2019

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



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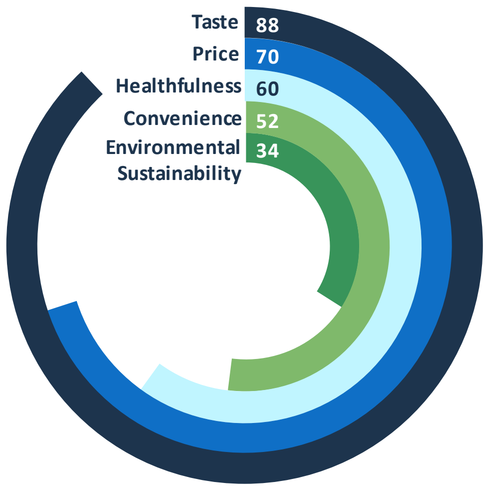
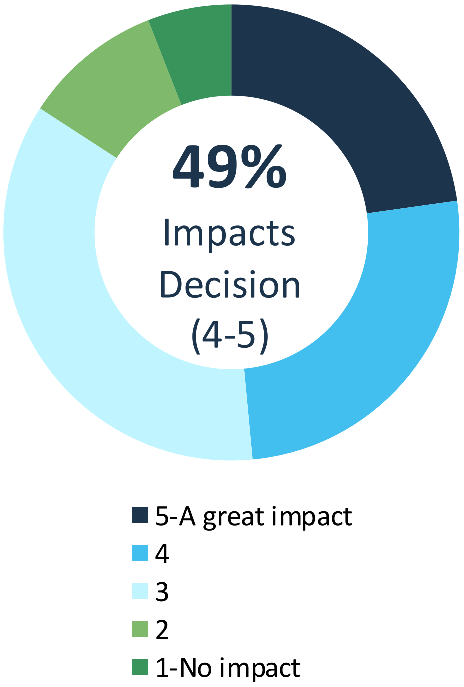


Q10 (TREND): How much of an impact do the following have on your decision to buy foods and beverages? (n=1,011)
**Prior to 2019, Environmental Sustainability was asked simply as "Sustainability"*

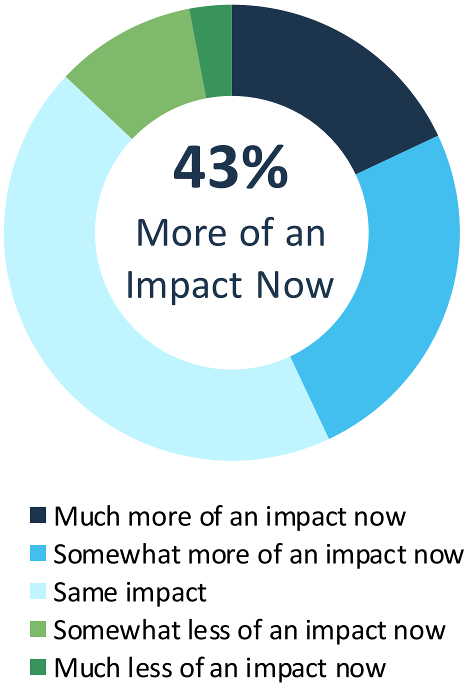
Half of Americans say that whether a food is processed impacts their purchasing decision

4 in 10 also view processing as having more of an impact on their purchasing decisions than it did 10 years ago

Current Impact of Whether a Product is Considered to be Processed



10 Year Change in Impact of Whether a Product is Considered to be Processed



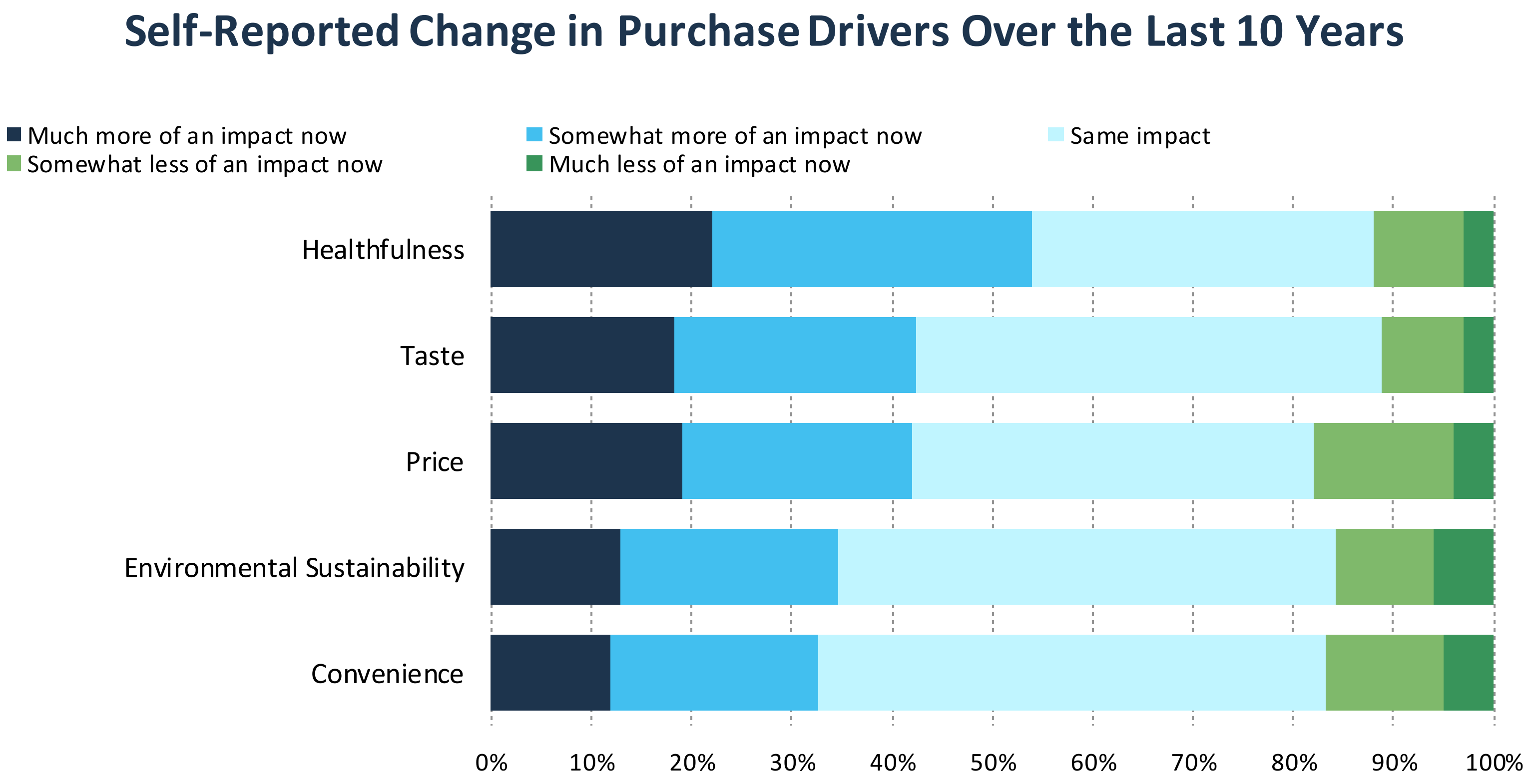
53% of consumers in very good health consider processing to be impactful (vs. 43% of those in poorer health)

58% of those who have followed a diet consider processing to be impactful (vs. 42% who haven't)

Q11: How much of an impact does the following have on your decision to buy foods and beverages? "Whether you consider the product to be processed" (n=1,011)
Q12: For each of the following, how has the impact on your decision to buy foods and beverages changed over the last 10 years? "Whether you consider the product to be processed" (n=1,011)

When consumers consider their own habits over the past decade, more than half say healthfulness impacts food shopping more now

Taste and price have also become more impactful for 4 in 10



Q12: For each of the following, how has the impact on your decision to buy foods and beverages changed over the last 10 years? (n=1,011)

63% of consumers ages 50+ indicate healthfulness has more of an impact now (vs. 46% under age 50)

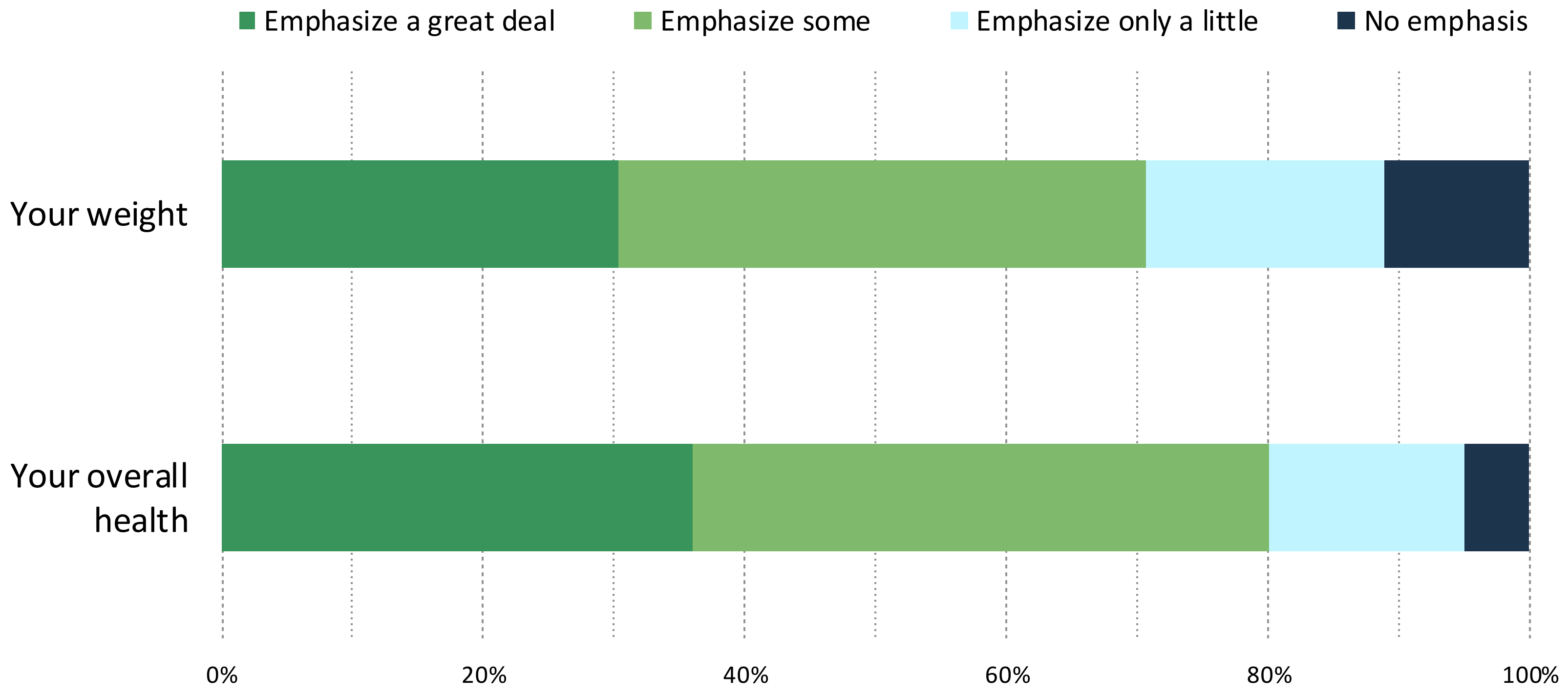
47% of women indicate price has more of an impact now (vs. 37% of men)

60% of those with spouses/partners indicate that healthfulness has more of an impact now (vs. 48% of single consumers)

When it comes to choosing what to eat/drink, overall health matters more to Americans than weight, but not by much

Over half say they emphasize both equally, while 29% place greater emphasis on overall health and 16% place greater emphasis on their weight

Emphasis Placed When Making Decisions About What to Eat and Drink



74% of women indicate they emphasize their weight a great deal/some (vs. 66% of men)

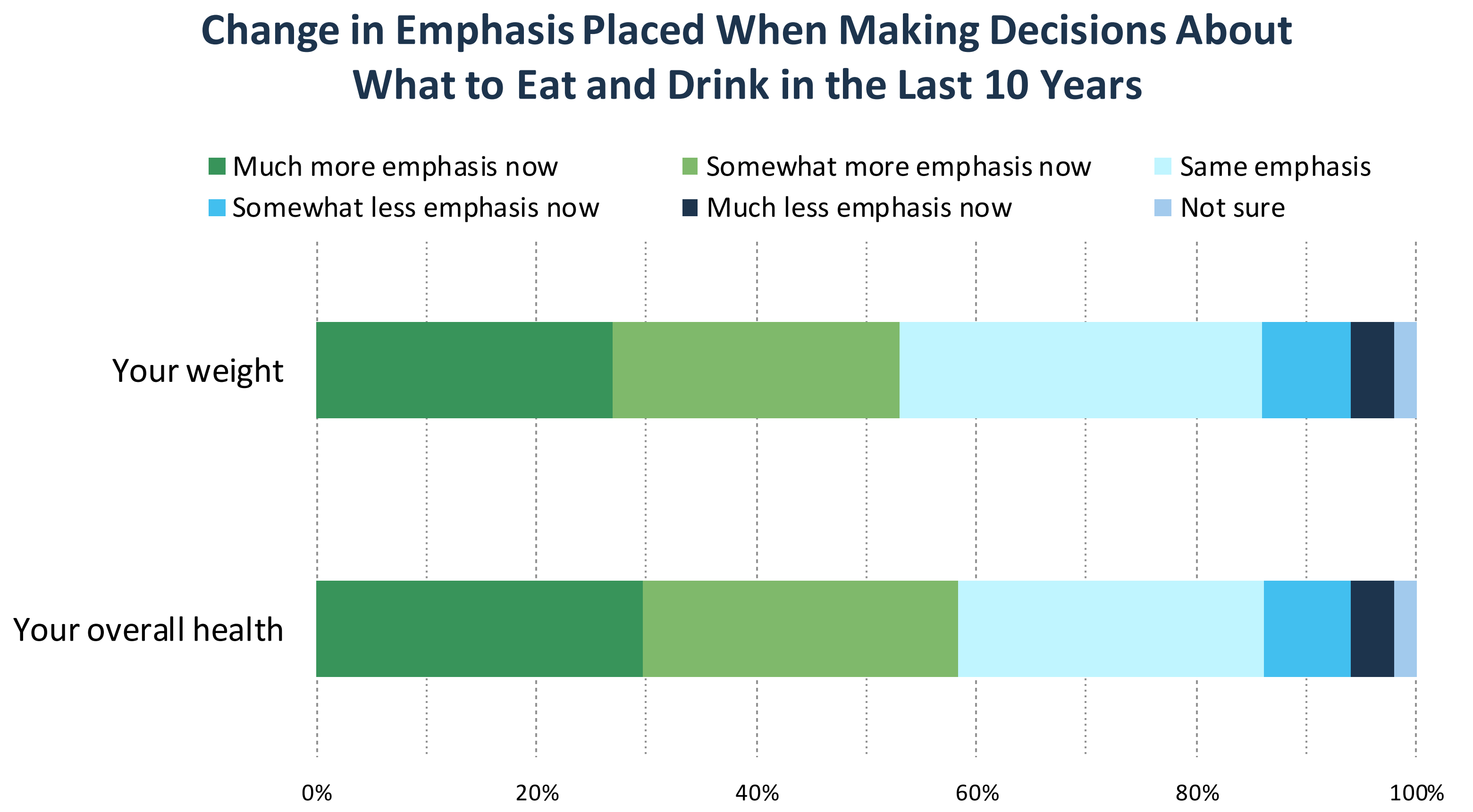
76% of those who are overweight/obese indicate they emphasize their weight a great deal/some (vs. 62% with a normal to low BMI)

85% of consumers with a college degree indicate they emphasize their overall health a great deal/some (vs. 78% with less than a college degree)

Q19: When making decisions about what to eat and drink, how much emphasis do you put on the following? (n=1,011)

Nearly 6 in 10 place more emphasis on their overall health now in comparison to how they made decisions a decade ago

At the same time, over half of Americans say they put a greater emphasis on their weight now compared to 10 years ago



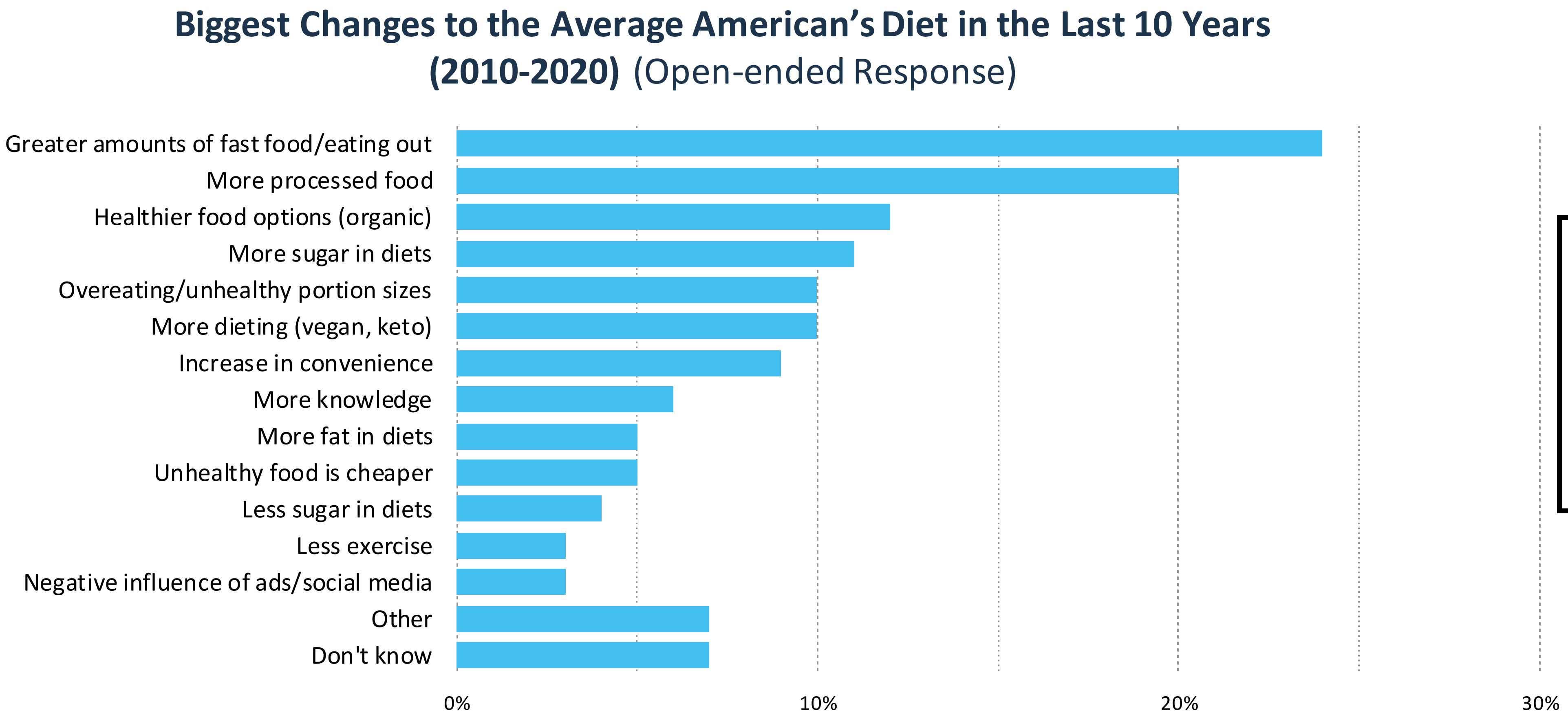
59% of those who are obese indicate they emphasize their weight more now (vs. 47% with a normal to low BMI)

58% of consumers who have followed a diet say they emphasize their weight more now (vs. 49% who haven't)

Q20: Now think back to 10 years ago (the year 2010). When making decisions about what to eat and drink, how has the emphasis you put towards the following changed versus 10 years ago? (n=1,011)

Consumers see increases in fast food/eating out and processed food as the biggest changes to the average diet

Meanwhile, about 1 in 8 say healthier food options have been the biggest trend this decade

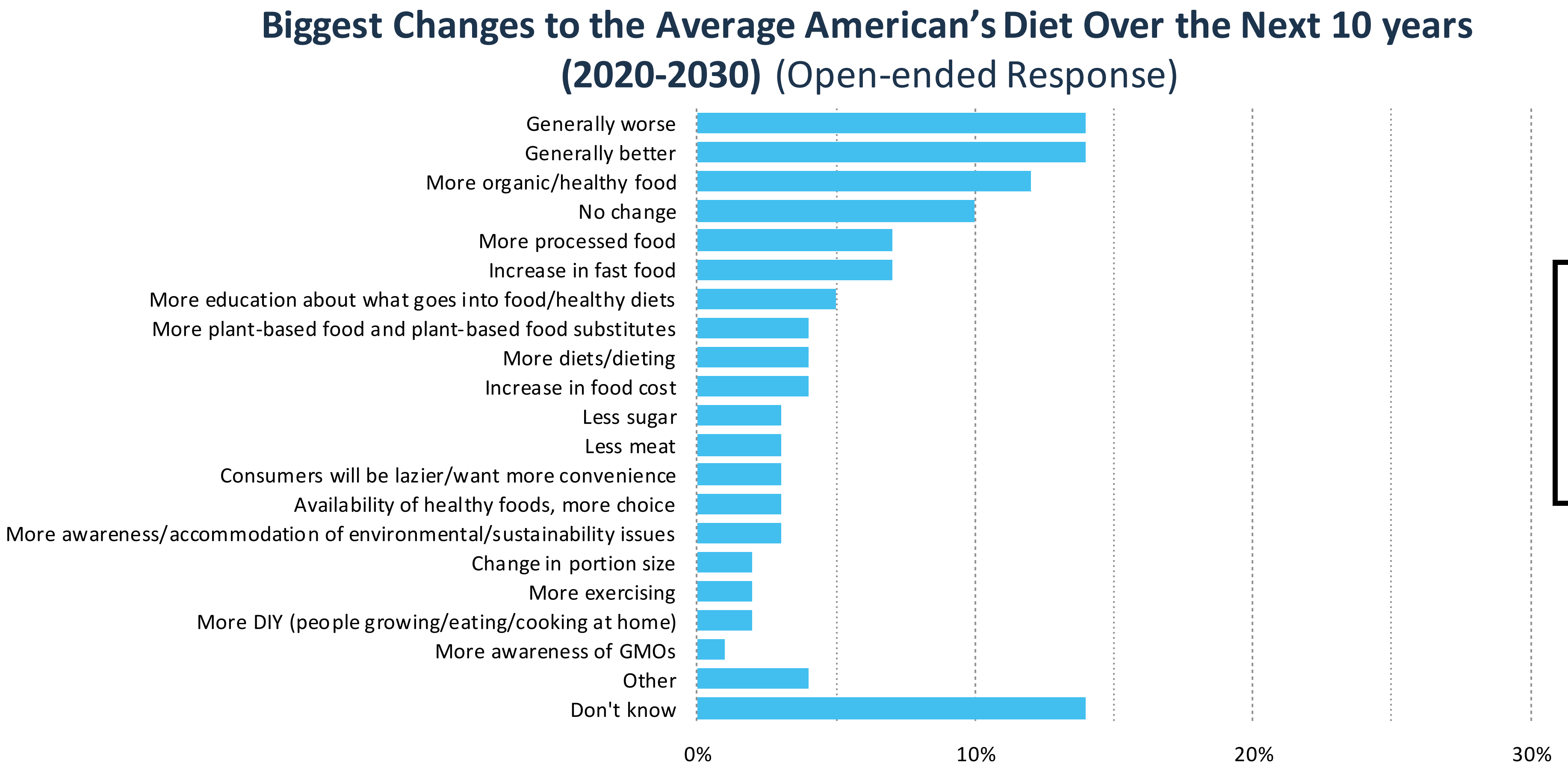


27% of consumers with a college degree believe that more processed food consumption has been one of the biggest changes (vs. 17% with less than a college degree)

Q8: What do you think have been the biggest changes to the average American's diet in the last 10 years (2010-2020)? Please give as much detail as possible. (n=1,011) Response options in the chart above are themes that were coded from open-ended comments. They do not represent direct quotes or options provided directly in the survey.

When it comes to projecting a decade into the future, Americans are decidedly varied on how diets will change

Interestingly, parents are more pessimistic about the next decade than their counterparts



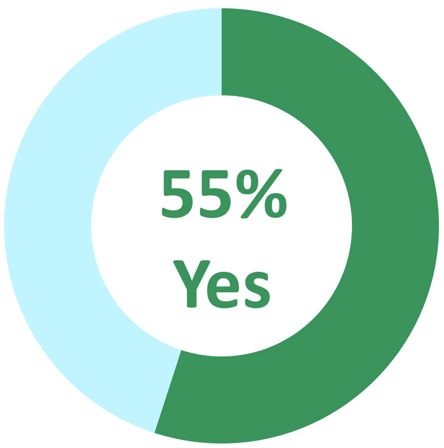
22% of parents with children under 18 think the average American's diet will be generally worse over the next decade (vs. 12% without children under 18)

Q9: What do you think will be the biggest changes to the average American's diet over the next 10 years (2020-2030)? Please give as much detail as possible. (n=1,011)
Response options in the chart above are themes that were coded from open-ended comments. They do not represent direct quotes or options provided directly in the survey.

The share of people making changes to improve the healthfulness of their diet is down significantly since 2010

In terms of motivators, weight loss is down from 2010 and maintaining weight is up

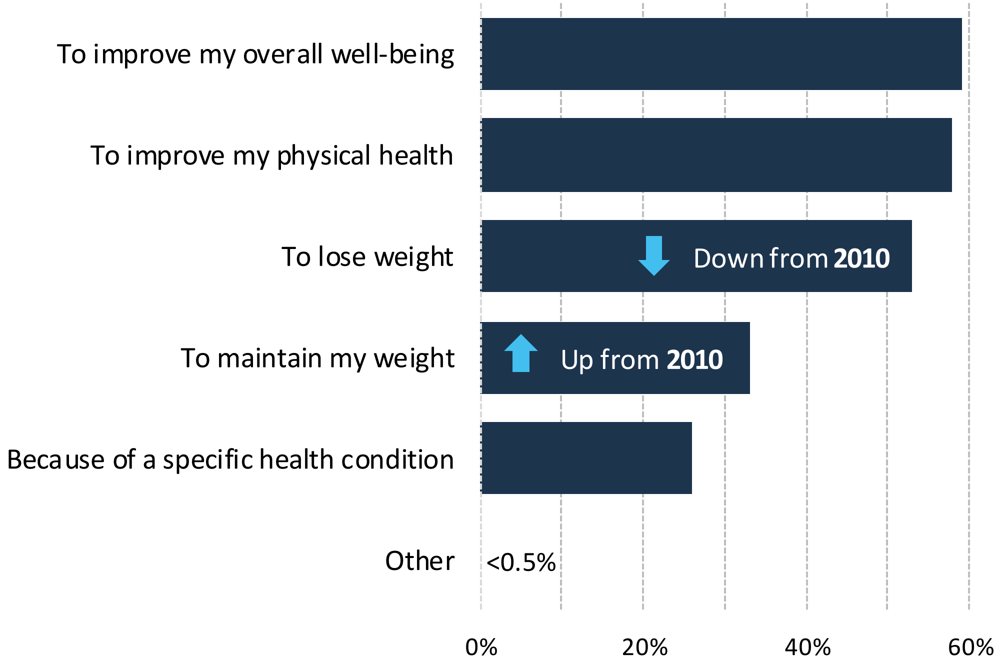
Changes to Improve Healthfulness of Diet in the Past 6 Months



Down from 2010 (64%)

66% of ages 18-34 made changes (vs. 51% ages 35+)

Reasons for Improving Healthfulness of Diet
(Of those who made changes to diet over past 6 months)

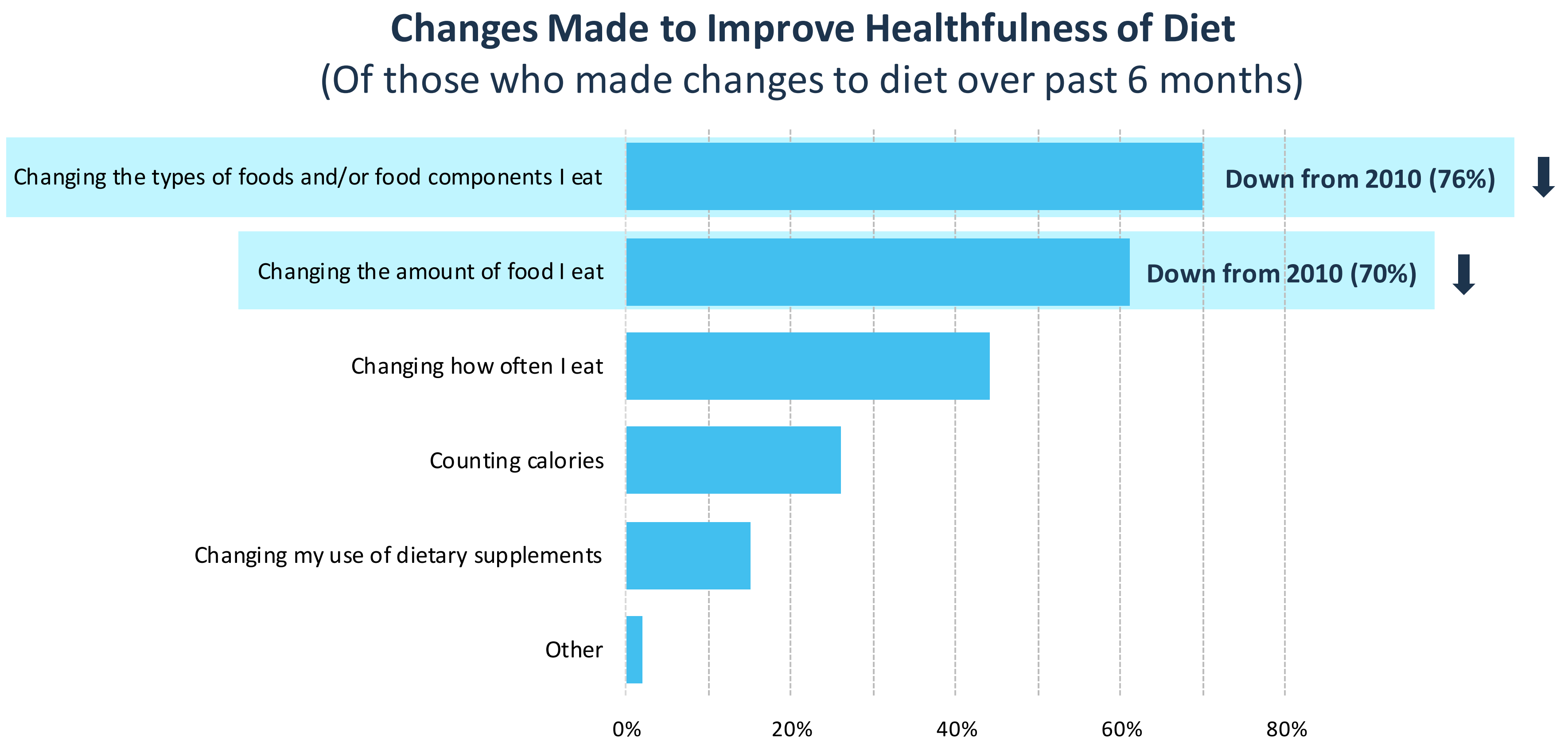


69% of consumers with an income of <$35k who made changes did so to improve their physical health (vs. 54% with an income of $35k+)

Q16 (TREND): Over the past six months, have you made any changes in an effort to improve the healthfulness of your diet? (n=1,011)
Q17 (TREND): For which of the following reasons are you trying to improve the healthfulness of your diet? Select all that apply. (Of those who made changes to diet, n=556)

Of those who made a dietary change over the past six months, 7 in 10 are changing the types of foods eaten

The second most popular change was to change the amount of food eaten



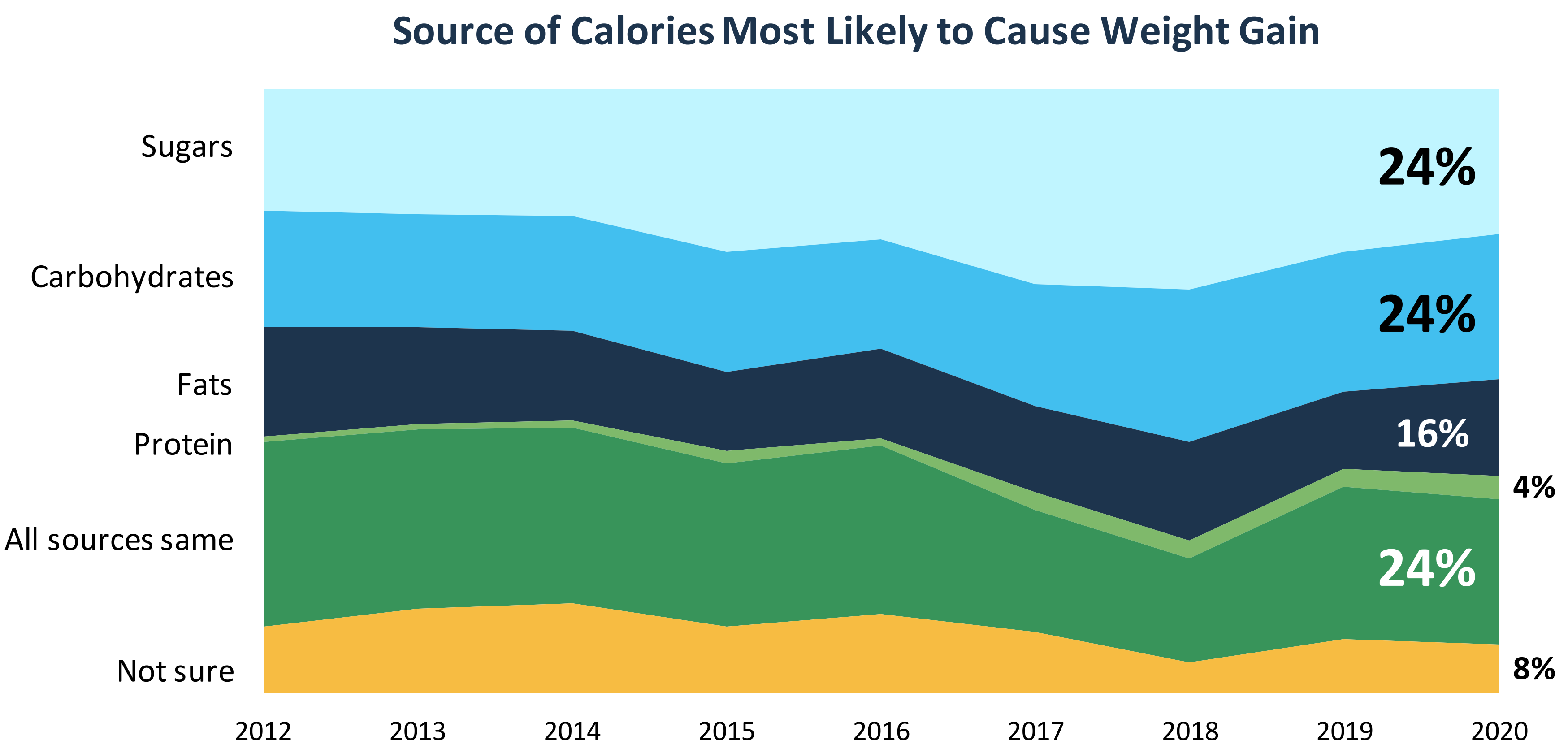
74% of parents **without** children under 18 who made a change indicate they changed the types of food they eat (vs. 62% with children under 18)

56% of Hispanics who made a change indicate they changed how often they eat (vs. 39% of non-Hispanic whites)

Q18 (TREND): Which of the following changes have you made in the past six months to improve the healthfulness of your diet? Select all that apply. (Of those who made changes to diet, n=556)

Little change in beliefs about sources of weight gain vs. 2019

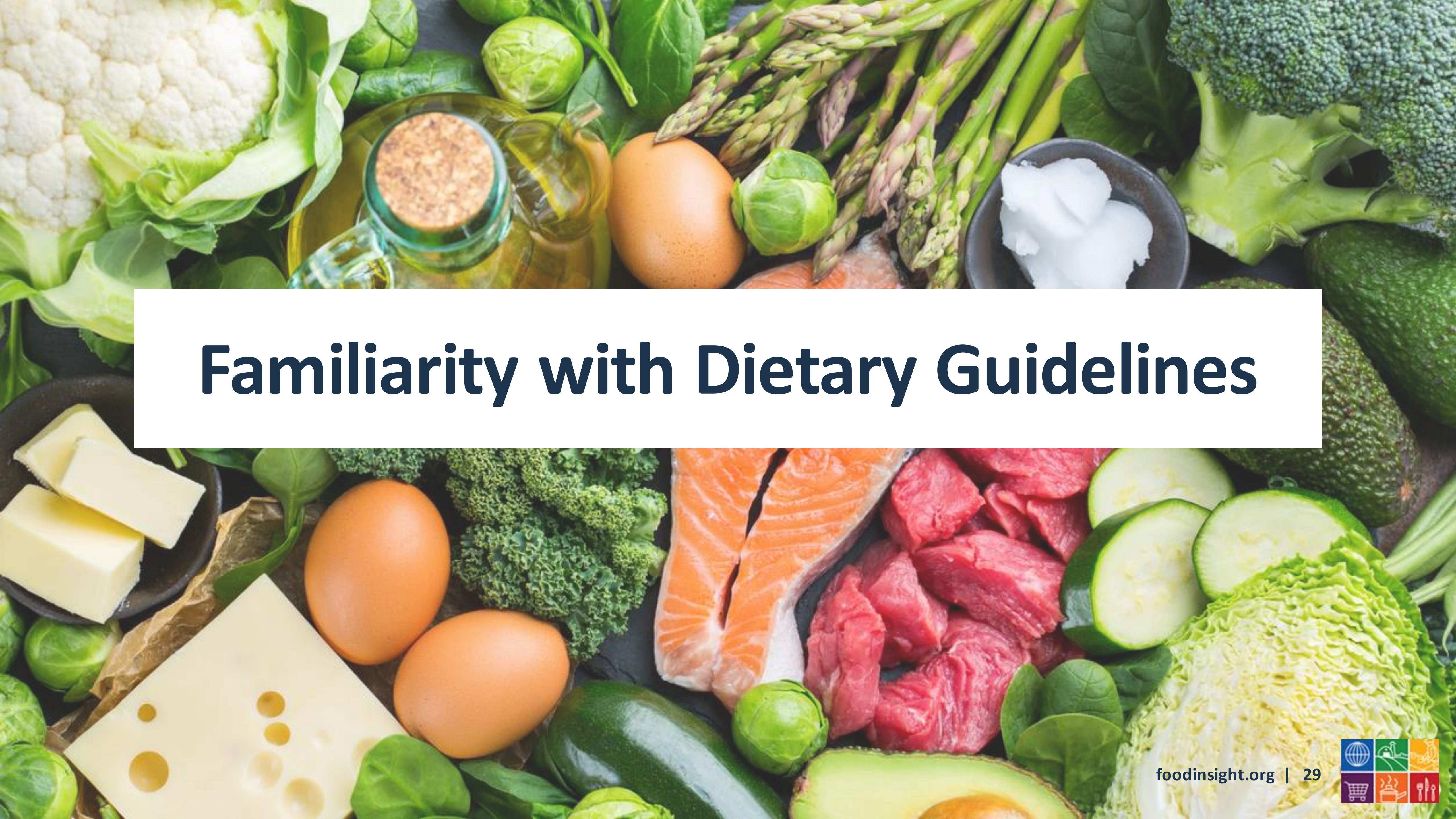
A quarter of consumers believe that all sources of calories are equally likely to cause weight gain



No change since 2019

30% of consumers with a college degree believe calories from sugars are most likely to cause weight gain (vs. 22% with less than a college degree)

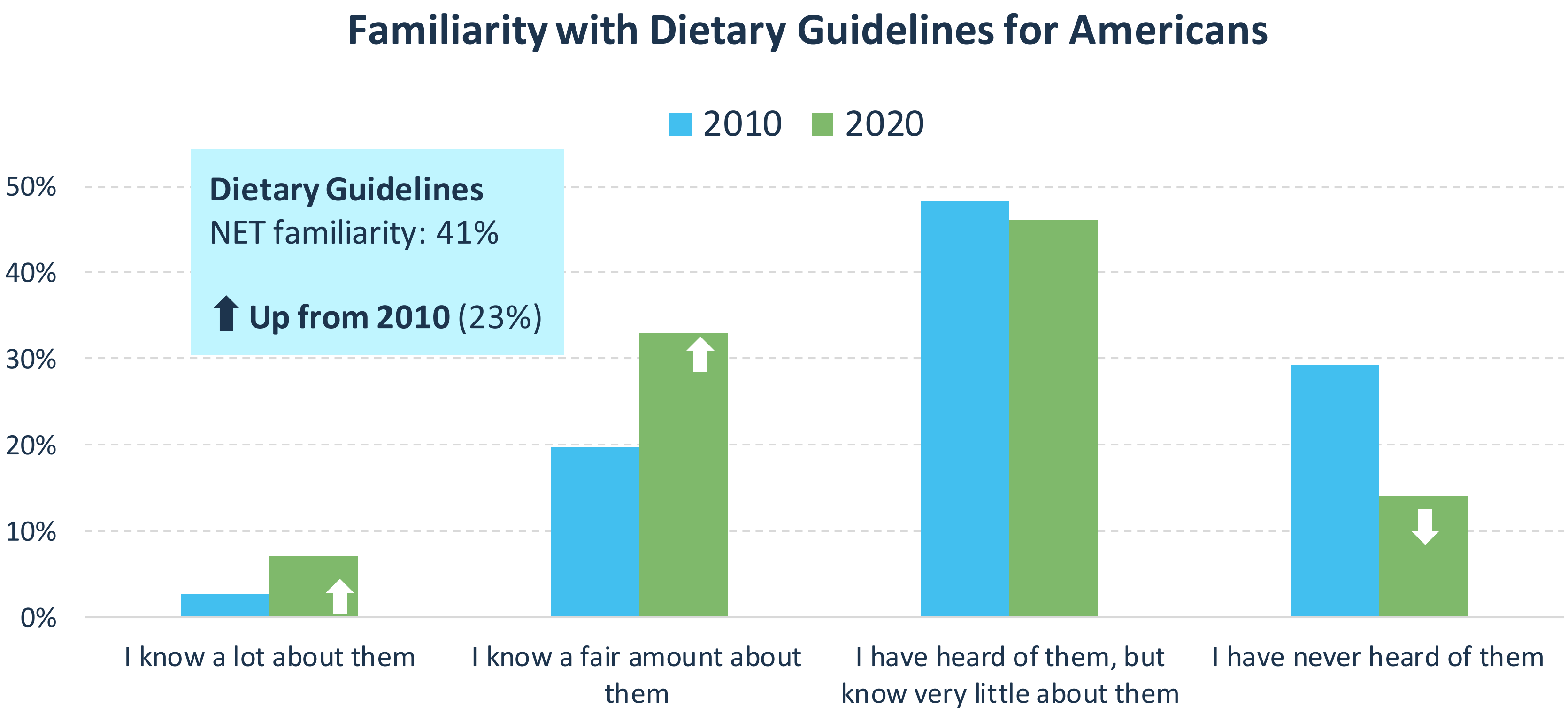
Q3 (TREND): What source of calories is the most likely to cause weight gain? (n=1,011)



Familiarity with Dietary Guidelines

Familiarity and knowledge about the Dietary Guidelines for Americans has increased significantly since 2010

There is a huge gap in awareness by health status: 49% in excellent/very good health know at least a fair amount about the guidelines vs. just 29% who are in poorer health



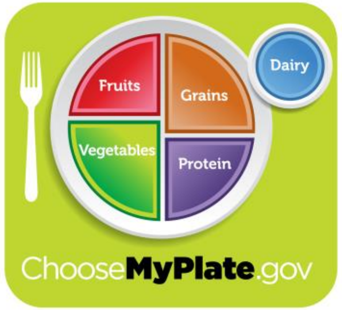
47% of consumers with a college degree know a lot/fair amount about the guidelines (vs. 37% with less than a college degree)

49% of consumers in excellent/very good health know a lot/fair amount about the guidelines (vs. 29% in poorer health)

52% of consumers who grocery shop online at least once a month know a lot/fair amount about the guidelines (vs. 33% who never shop online)

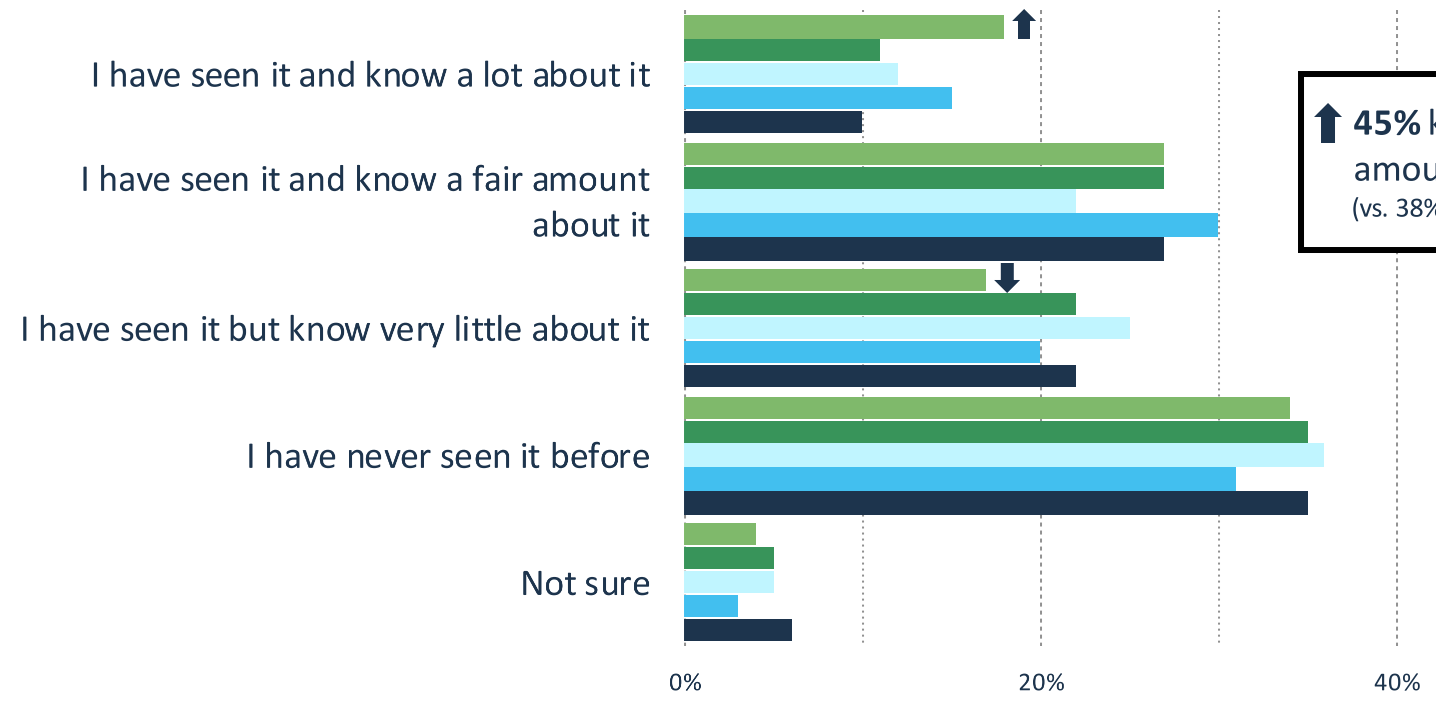
Q15 (TREND): Which of the following best describes your familiarity with the "Dietary Guidelines for Americans", which are the US government-approved food and nutrition guidelines? (n=1,011)

Familiarity with the MyPlate graphic has increased since 2019



Younger consumers, parents, those with a lower BMI, those in good health, and those who followed a diet are more likely to know about the graphic

Familiarity with the MyPlate Graphic



45% know a lot/fair amount
(vs. 38% in 2019)

62% of consumers ages 18-34 know a lot/fair amount about the graphic (vs. 37% ages 35+)

52% of consumers with a normal to low BMI know a lot/fair amount about the graphic (vs. 39% who are overweight or obese)

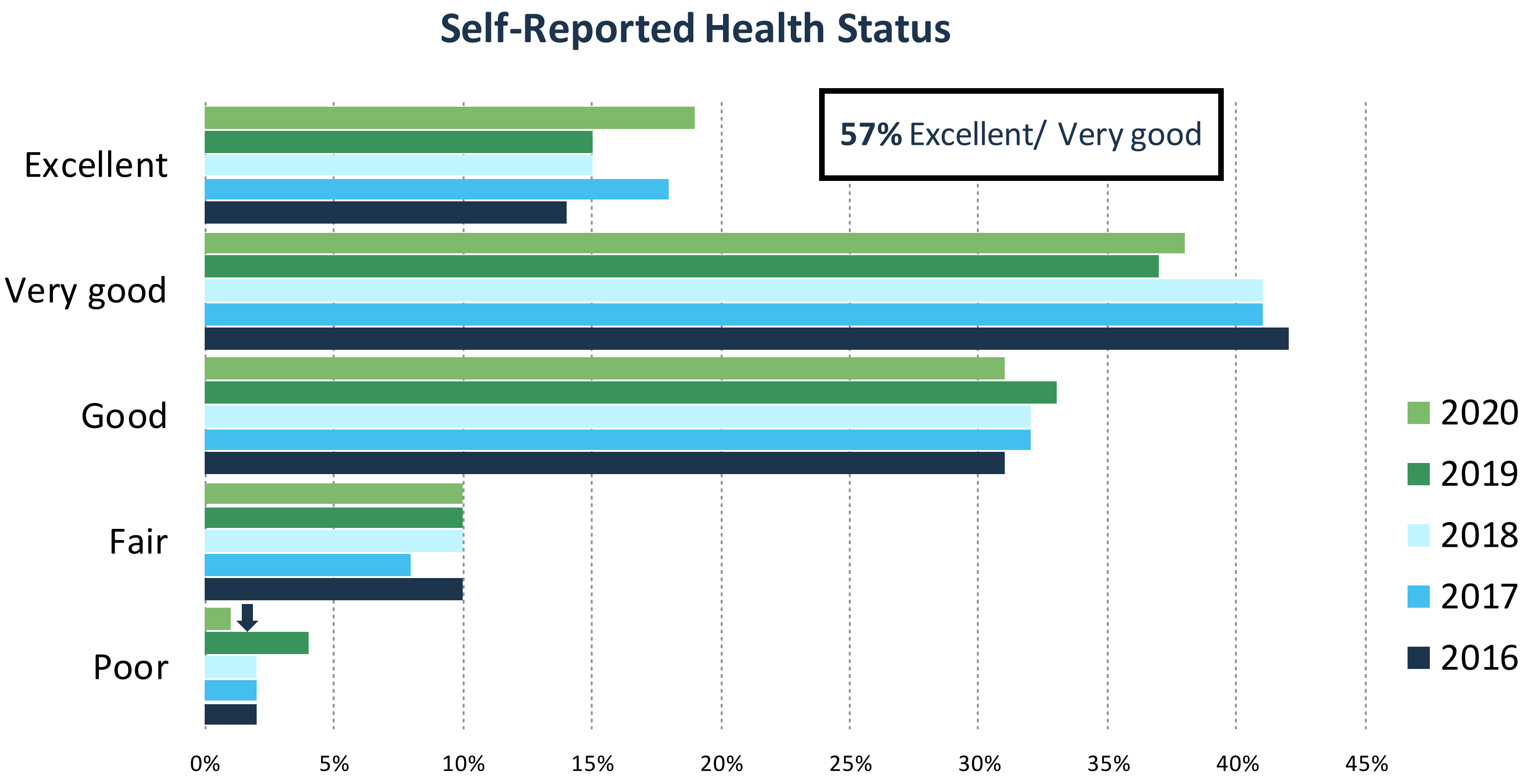
59% of parents with children <18 years know a lot/fair amount about the graphic (vs. 39% without children)

Q2 (TREND): How familiar are you, if at all, with the following graphic? (n=1,011)

Diets and Eating Patterns

More than half of Americans consider themselves to be in excellent or very good health

As has been the case in previous years, the health disparity by income is immense: only 39% of those with income of less than $35K view their health as excellent/very good



69% of consumers ages 18-34 describe their health as excellent/very good (vs. 51% ages 35+)

70% of consumers with a college degree describe their health as excellent/very good (vs. 50% with less than a college degree)

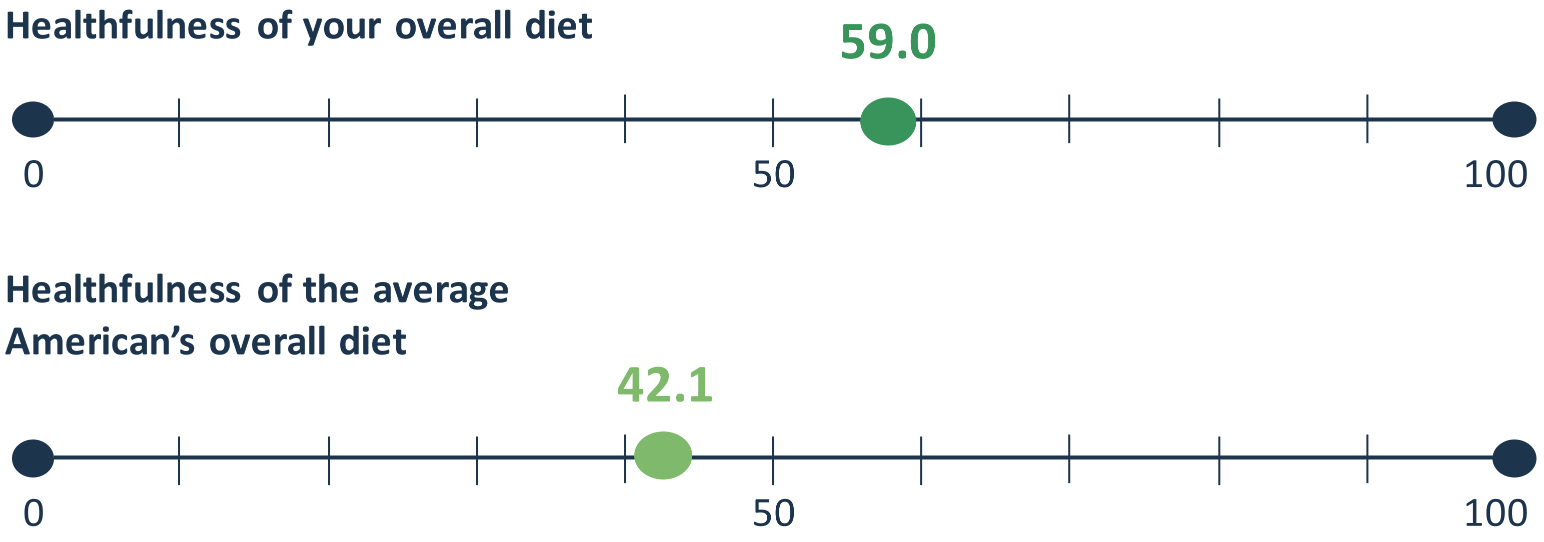
63% of consumers with an income of $35k+ describe their health as excellent/very good (vs. 39% with an income of <$35k)

Q1 (TREND): How would you describe your own health, in general? (n=1,011)

Nearly 3 in 4 judge their own diet to be healthier than that of the average American

Those with higher income and education, as well as urban and suburban consumers, are more likely to consider their diet healthier than the average American

Healthfulness of Consumers' Overall Diet Compared to the Average Americans Overall Diet



86% of consumers with a college degree believe their diet is healthier than average (vs. 67% with less than a college degree)

76% of consumers with an income of $35k+ believe their diet is healthier than average (vs. 64% with <$35k)

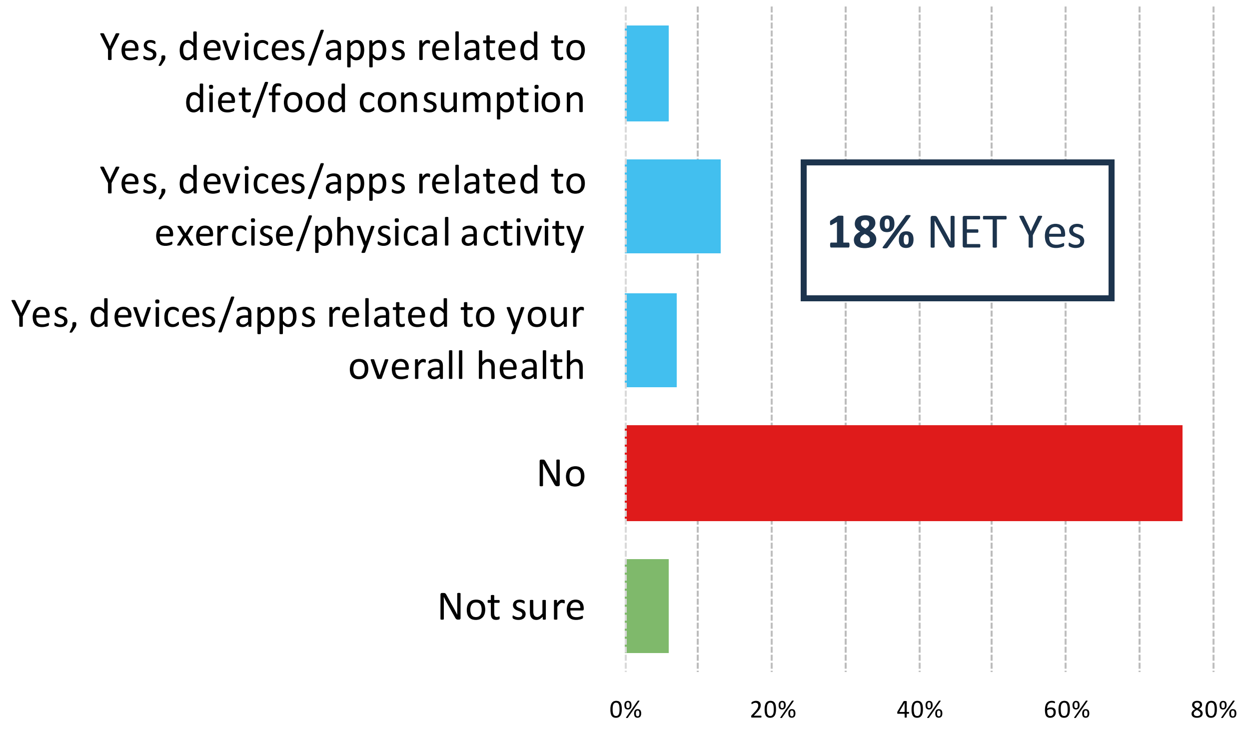
77% and 74% of suburban and urban consumers, respectively, believe their diet is healthier than average (vs. 62% of rural consumers)

Q6: How would you rate the healthfulness of your overall diet on a scale of 0 to 100 (where 0 means "very poor" and 100 means "excellent")? (n=1,011)
Q7: How would you rate the healthfulness of the average American's overall diet on a scale of 0 to 100 (where 0 means "very poor" and 100 means "excellent")? (n=1,011)

Nearly 1 in 5 Americans are using a mobile health monitoring device or app

Women, parents, those with higher income and education, those in urban areas, and those following a diet are all more likely to use one

Health Monitoring Devices or Apps Used



Most common examples:
Apple Health app
Apple watch
Calorie counter
Fitbit
My FitnessPal app
Weight Watchers app

25% of consumers with a college degree use a device/app (vs. 15% with less than a college degree)

22% of women use a device/app (vs. 14% of men)

25% of consumers with an income of $75k+ use a device/app (vs. 15% of those with <$75k)

27% of consumers who have followed a diet in the past year use a device/app (vs. 11% who haven't)

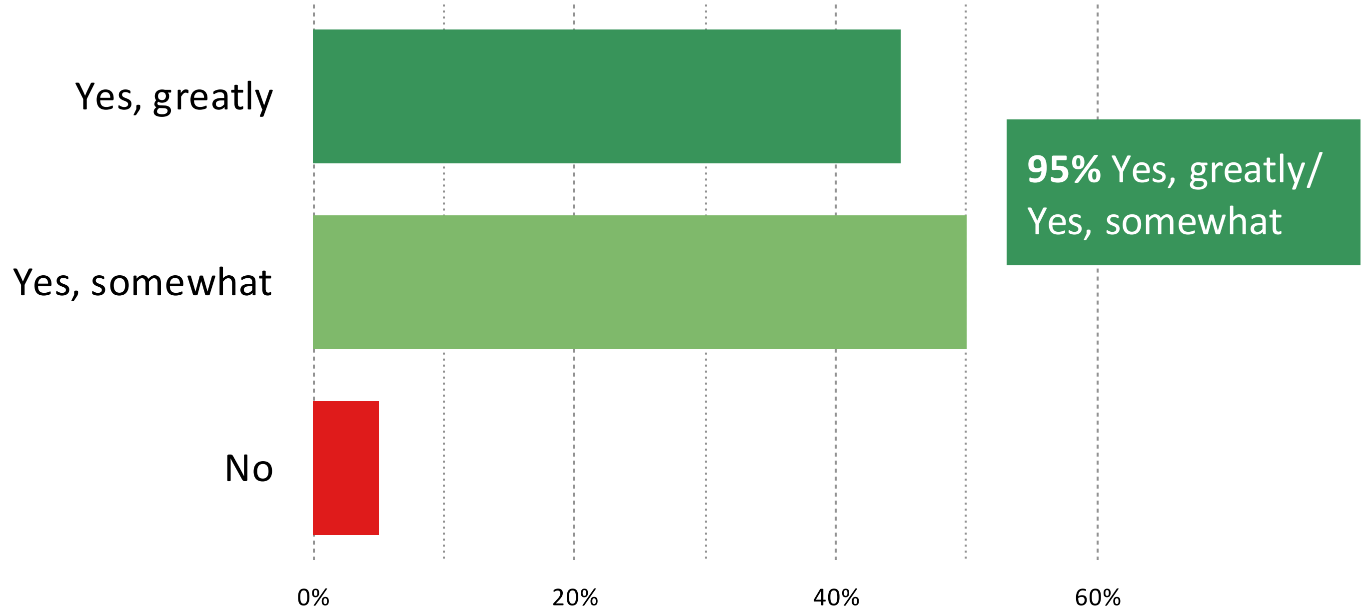
27% of parents with children under 18 use a device/app (vs. 15% without)

Q21: Do you use any mobile health monitoring devices or apps? Select all that apply. (n=1,011)

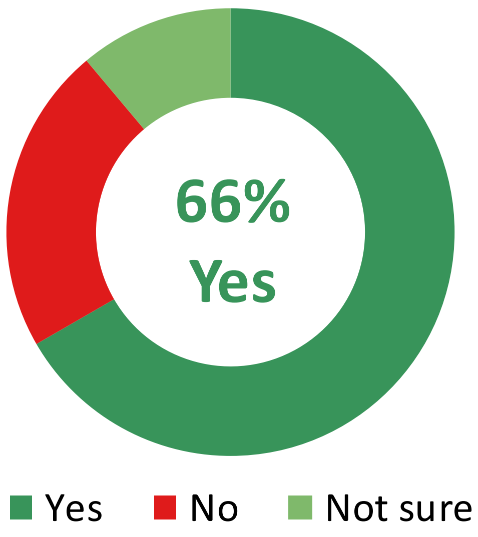
Two-thirds of those using health monitoring devices/apps say they have led to healthy changes in their life

Nearly all feel more aware of their health status, with 45% saying it helps greatly

Increased Awareness due to Health Monitoring Devices/Apps
(Of those who used any devices/apps)



Healthy Changes due to Health Monitoring Devices/Apps
(Of those who used any devices/apps)

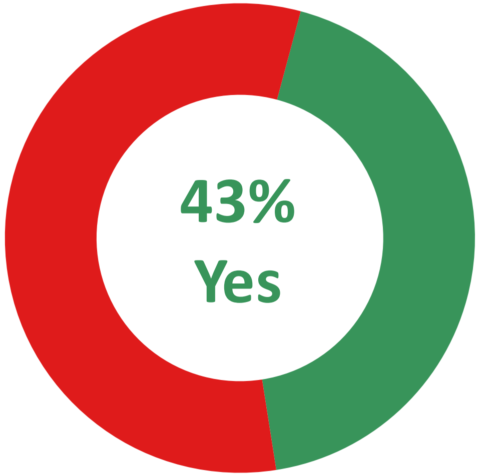


Q22: Have these health monitoring devices/apps made you more aware of your health status than you otherwise would have been? (Of those who used any devices/apps, n=183)
Q23: Have these health monitoring devices/apps resulted in healthy changes that you otherwise wouldn't have taken? (Of those who used any devices/apps, n=183)

More Americans are following a diet in 2020 than in 2019

Intermittent fasting has edged out clean eating as the most common diet followed

Followed A Diet in Past Year?

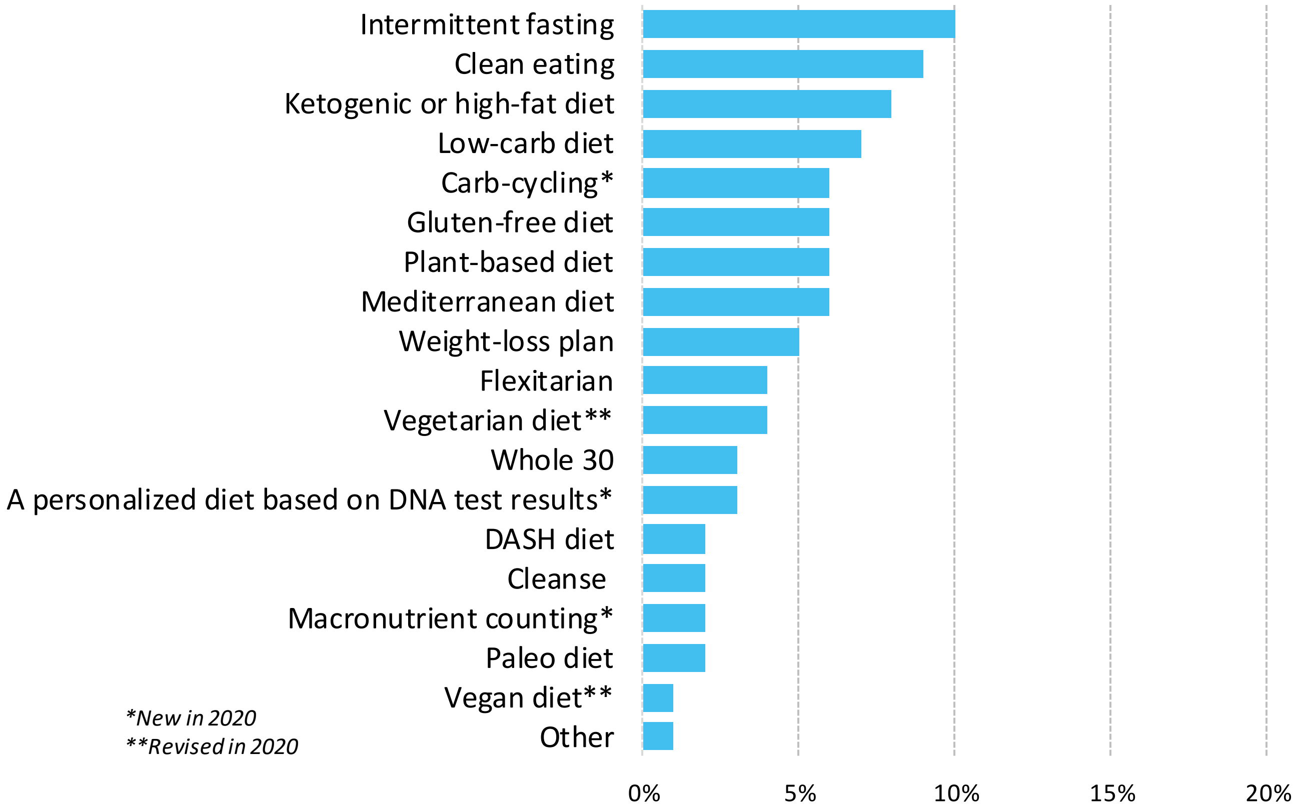


Up from 2019 (38%)

58% of consumers age 18-34 report trying a diet (vs. 37% ages 35+)

57% of consumers with children under 18 report trying a diet (vs. 38% without kids)

Type of Diet Followed

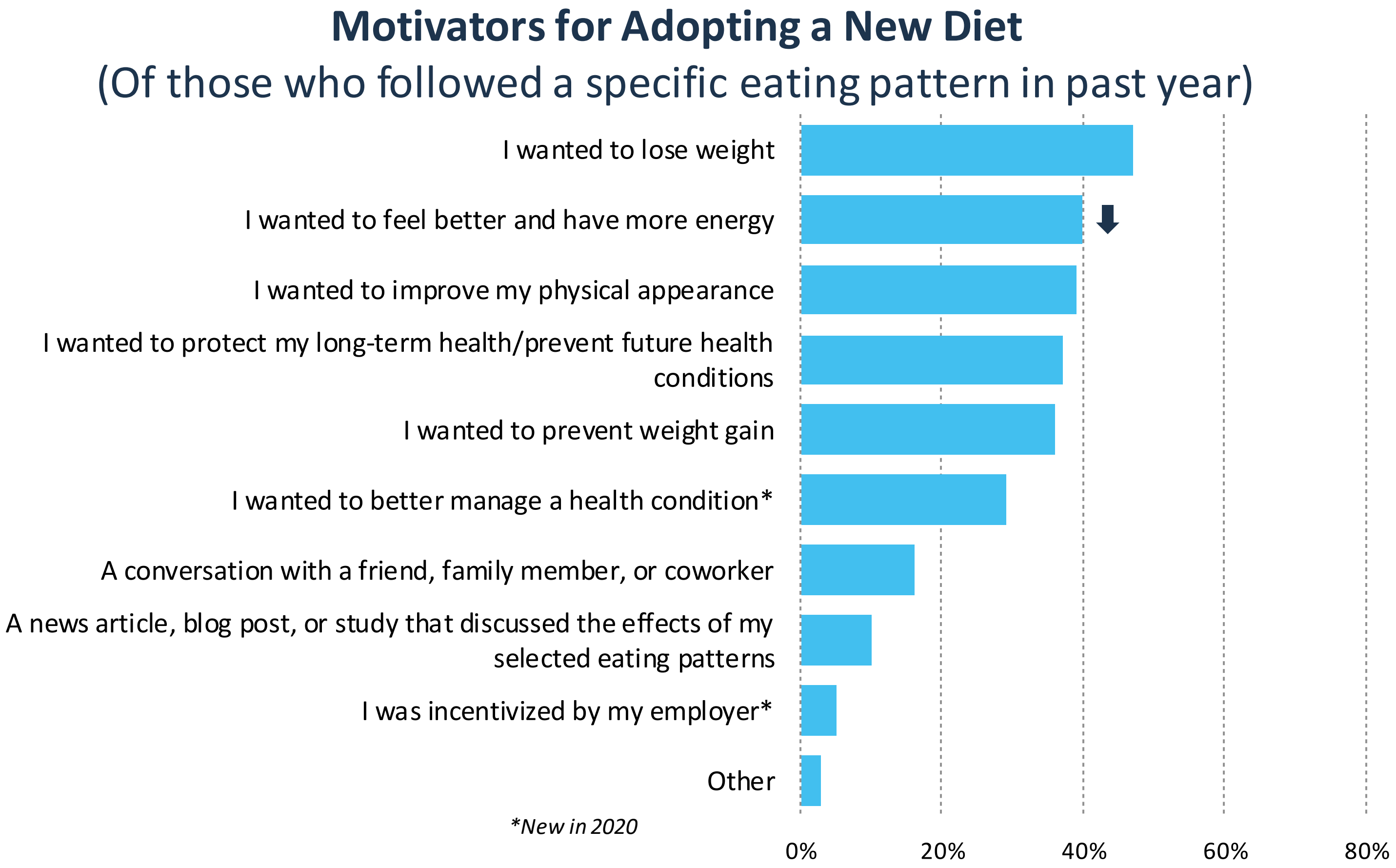


*New in 2020
**Revised in 2020

Q30 (REVISED TREND): Have you followed any specific eating pattern or diet at any time in the past year? Select all that apply. (n=1,011)

Wanting to lose weight is the top motivator for adopting a new diet, especially for Americans over age 35

Women are significantly more likely to diet to protect long-term health than men



56% of consumers ages 35+ say their motivation was to lose weight (vs. 36% under age 35)

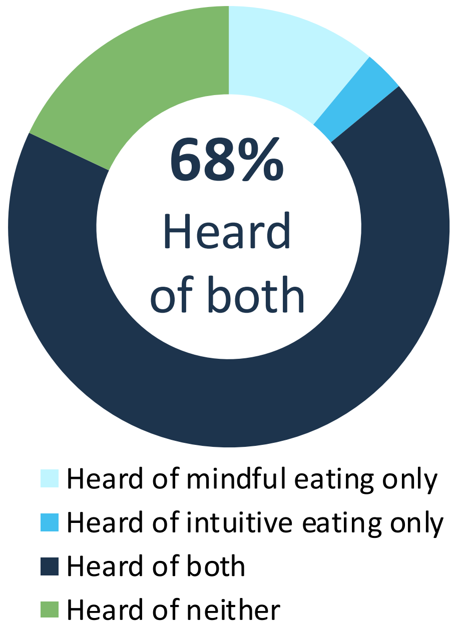
45% of women say their motivation was to protect their long-term health/prevent future health conditions (vs. 29% of men)

44% of single consumers say their motivation was to prevent weight gain (vs. 28% with a spouse/partner)

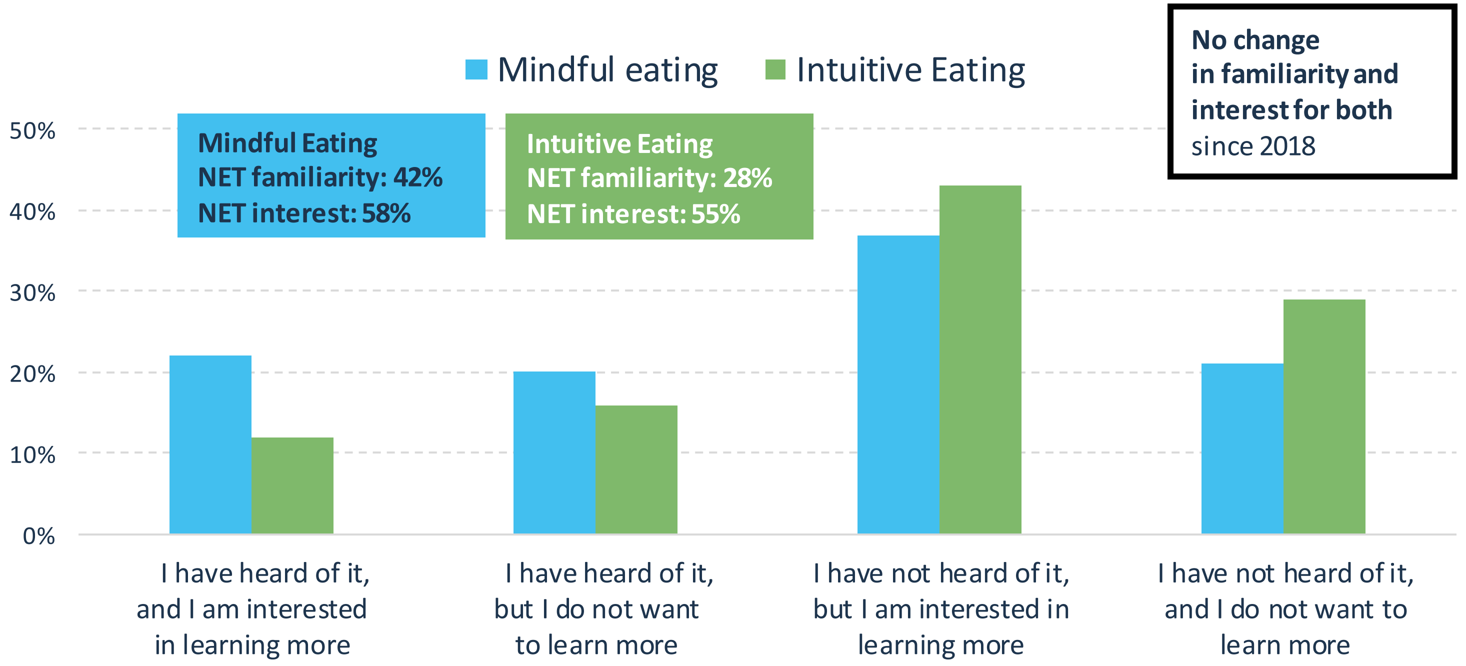
Q31 (REVISED TREND): Which of the following motivated you to make an effort to adopt a new eating pattern/diet? Select all that apply. (Of those who tried a diet in the past, n=417)

Two-thirds have heard of both mindful eating and intuitive eating, although mindful eating is more known

Those in very good health and those who grocery shop online at least once a month are more likely than their counterparts to be familiar with mindful eating



Familiarity and Interest in Mindful Eating & Intuitive Eating

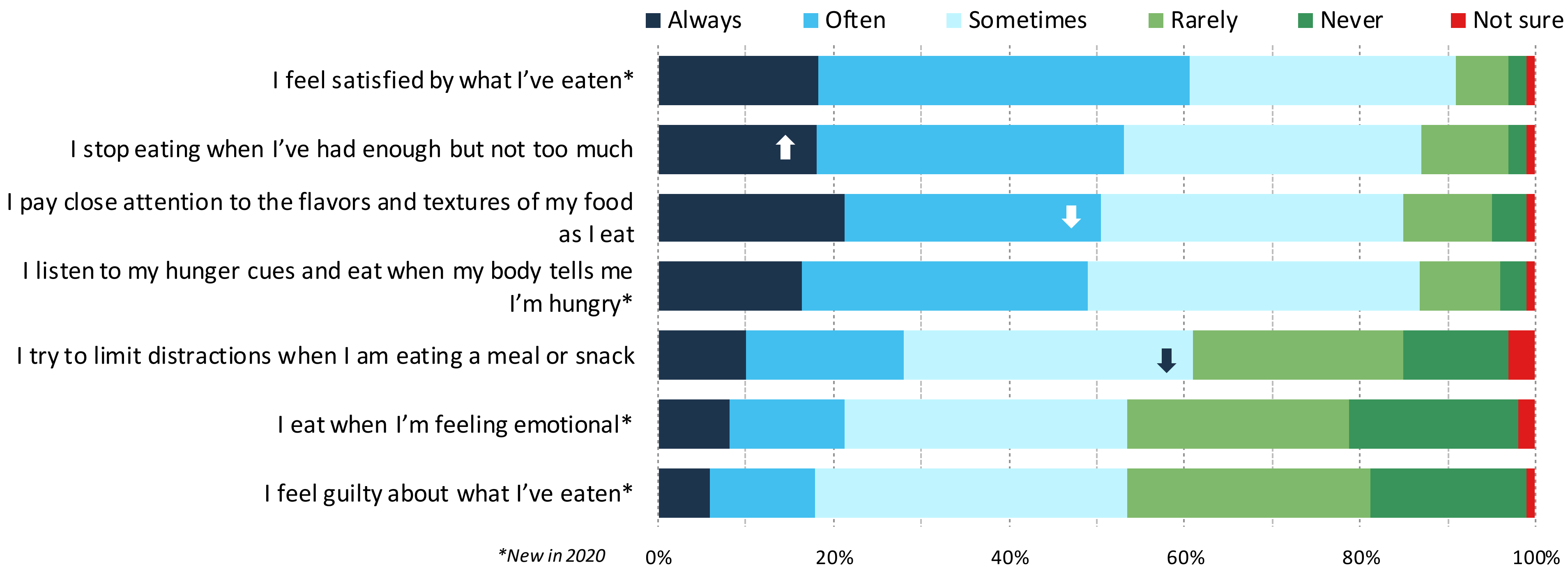


Q28 (TREND): Which of the following best describes your familiarity and interest in the practice of “mindful eating”? (n=1,011)
Q29 (TREND): Which of the following best describes your familiarity and interest in the practice of “intuitive eating”? (n=1,011)

Half of Americans stop eating when full and listen to hunger cues for when to eat

Those who have followed a diet are more likely to pay close attention to their food's flavors and textures and to limit distractions when eating, but are also more likely to feel guilt and emotionally eat

Eating Patterns Related to Mindful/Intuitive Eating



*New in 2020

65% of consumers ages 65+ stop eating when they've had enough to eat but not too much (vs. 50% <age 65). Older consumers are also more likely to feel satisfied by their food.

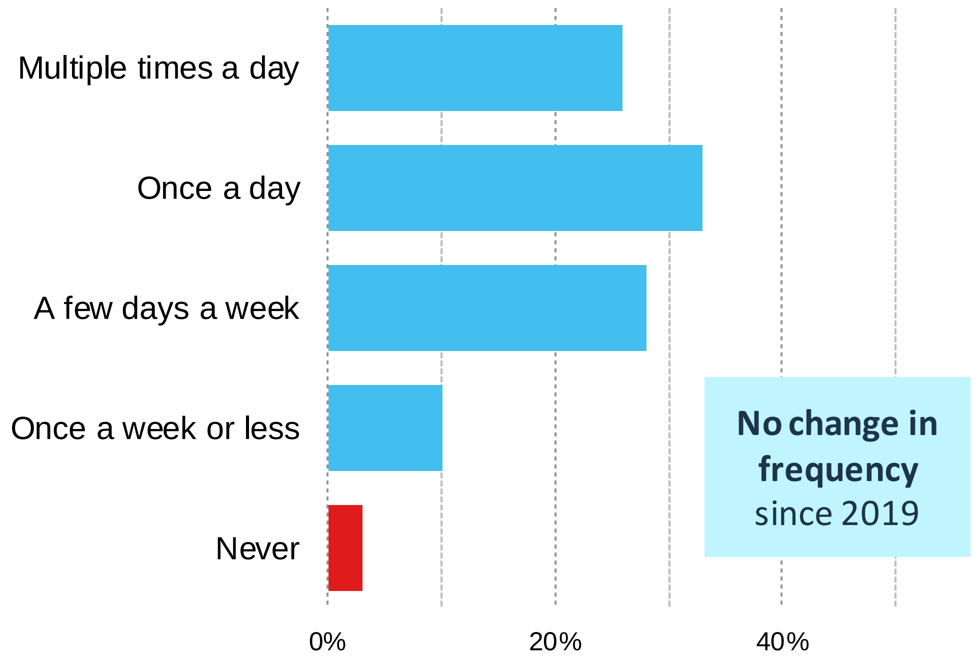
33% of parents with children <18 years eat when they are feeling emotional (vs. 16% without children). Parents are also **less** likely to feel satisfied by their food.

Q24 (TREND): How often do you do the following? (n=1,011)

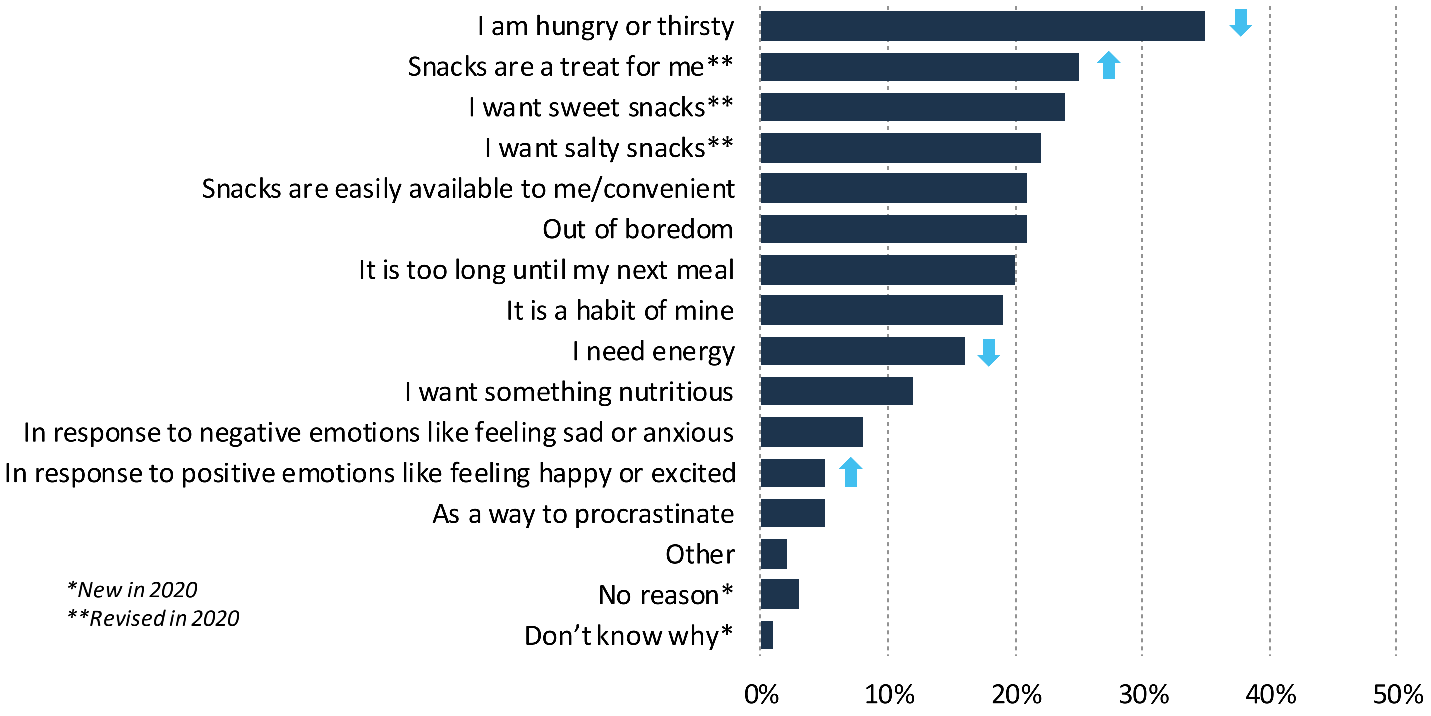
Consistent with 2019, a quarter of Americans snack multiple times a day

Younger consumers, those with lower income and education, those who are single, those with a higher BMI, and African Americans are all more likely to snack multiple times a day

Frequency of Snacking



Reasons for Snacking



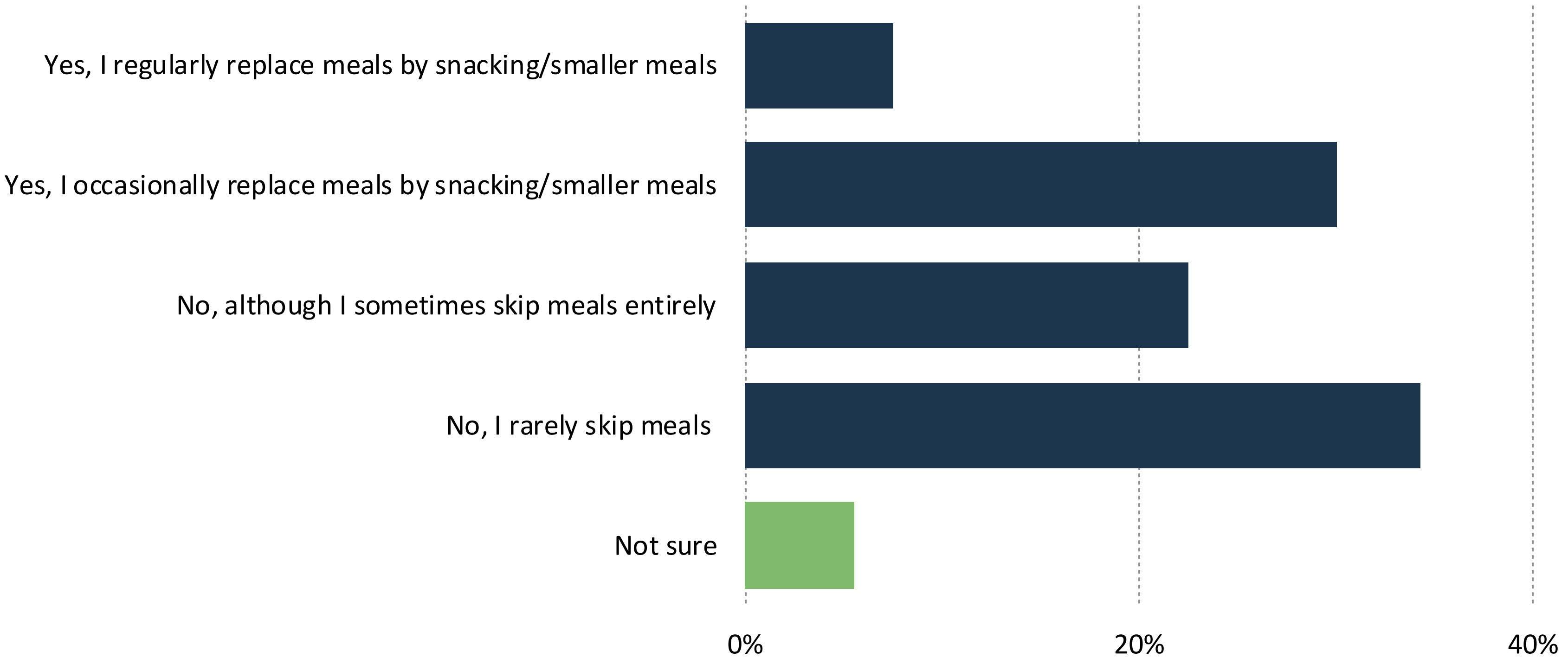
**New in 2020*
***Revised in 2020*

Q25 (TREND): In a typical week, how often do you snack in addition to your main meals? (n=1,011)
Q26 (REVISED TREND): Which of the following are the most common reasons why you choose to snack? Please select your top 3 reasons. (Of those who snack n=982)

Nearly 4 in 10 at least occasionally replace meals by snacking

A quarter skip meals entirely; Lunch is the most common meal that Americans replace by snacking

Replacing Meals with Snacks/Smaller Meals



44% of women indicate they regularly/occasionally replace meals by snacking (vs. 31% of men)

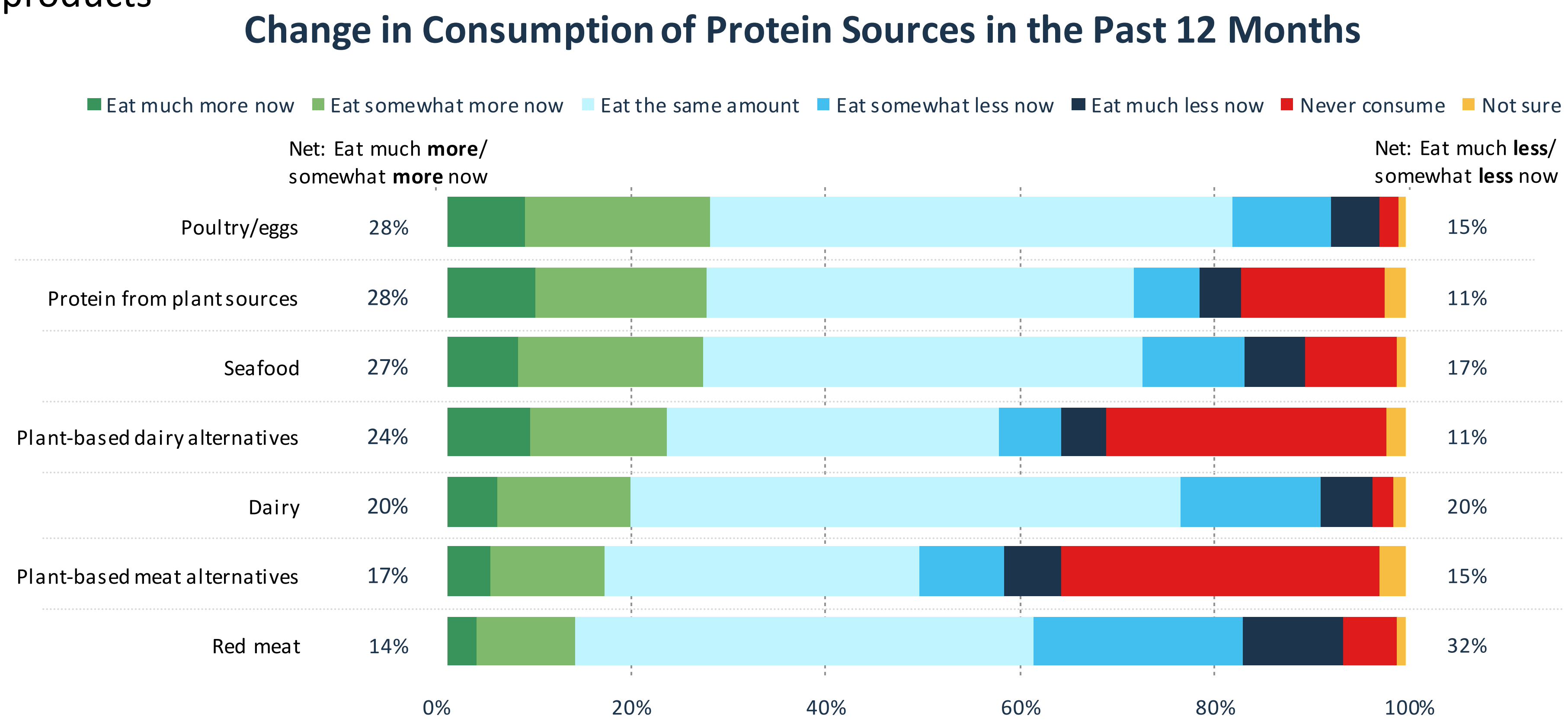
49% of consumers in the Midwest indicate they regularly/occasionally replace meals by snacking (vs. 34% from the South, 35% from the West, and 36% from the Northeast)

Q27: Do you ever replace traditional meals (breakfast, lunch, dinner) by snacking or eating smaller meals instead? (n=1.011)

Nutrients and Desired Health Benefits

Consumption of plant-based meat and dairy alternatives has increased in the past year, but 3 in 10 still report never consuming them

Those under age 35 are especially likely to have increased consumption of plant-based products



Q36: Thinking about the last 12 months, how has your consumption of the following changed? (n=1,011)

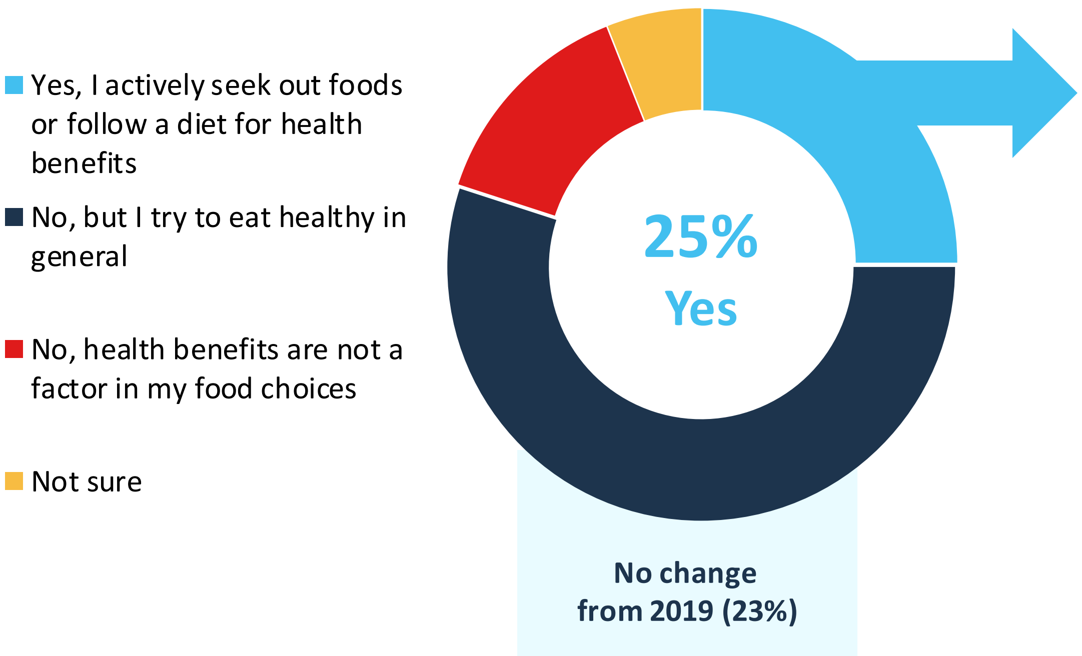
37% of consumers ages 18-34 indicate they eat more protein from plant sources (vs. 24% ages 35+)

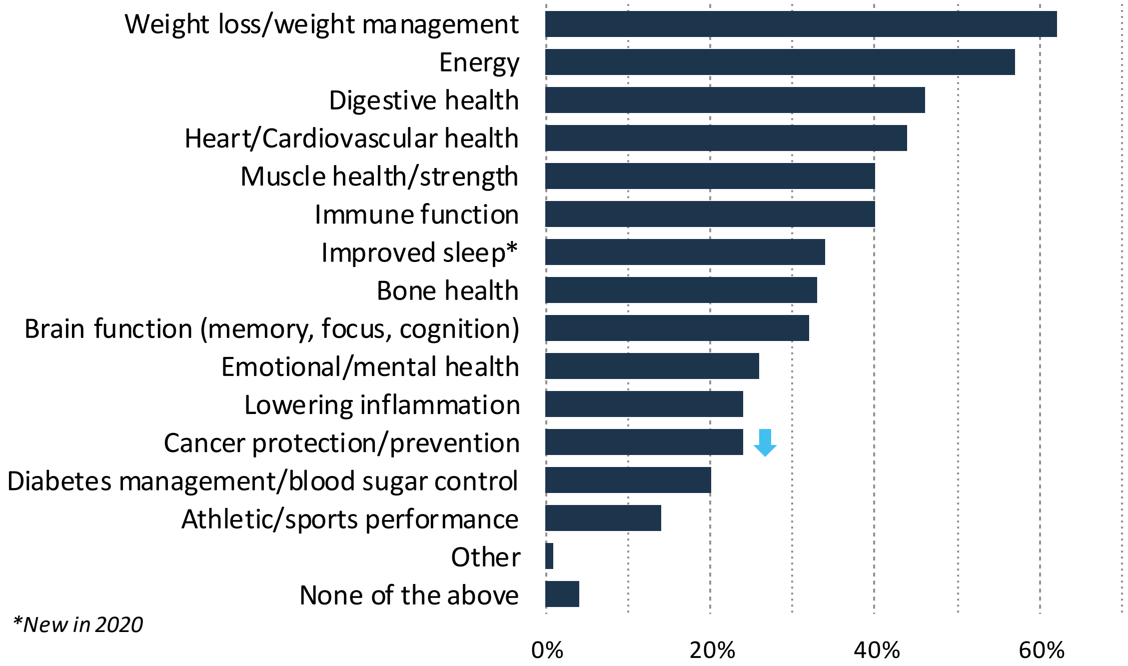
31% of consumers with children <18 indicate they eat more plant-based dairy alternatives (vs. 21% those without children). Parents also consume more dairy in general.

Consumers who have followed a diet in the past year are more likely than those who haven't to indicate they eat more protein from plant sources (41% vs. 18%), poultry/eggs (37% vs. 22%), seafood (33% vs. 23%), and plant-based meat alternatives (28% vs. 9%)

A similar share seek health benefits from foods vs. 2019 and for similar reasons

Those in very good health are more likely than their counterparts to actively seek out foods or follow a diet for the health benefits

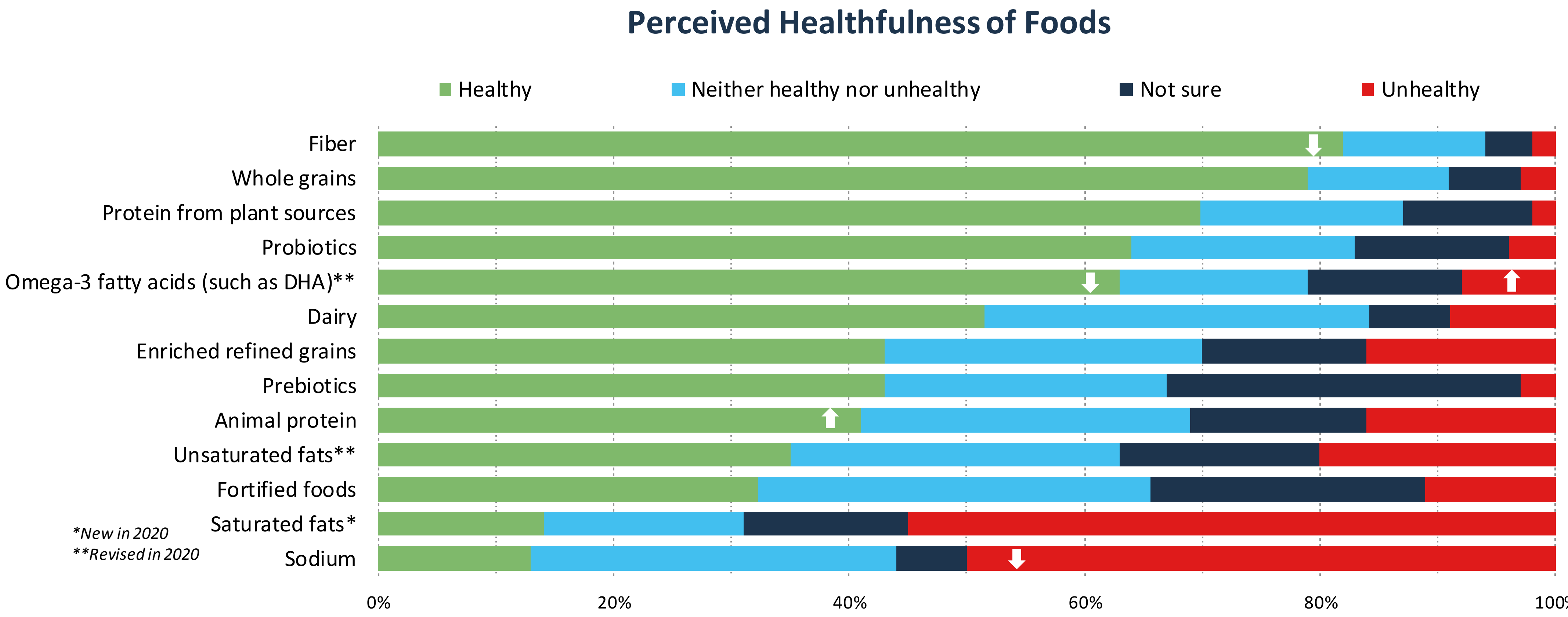




Q32 (TREND): Do you seek out certain foods or follow a particular diet because of the health benefits that those foods/diet provide? (n=1,011)
Q35 (REVISED TREND): Which of the following health benefits are you seeking to get from foods or nutrients? Select all that apply. (Of those who seek health benefits from foods, n=232)

Fiber, whole grains, and protein from plant sources are viewed as healthiest

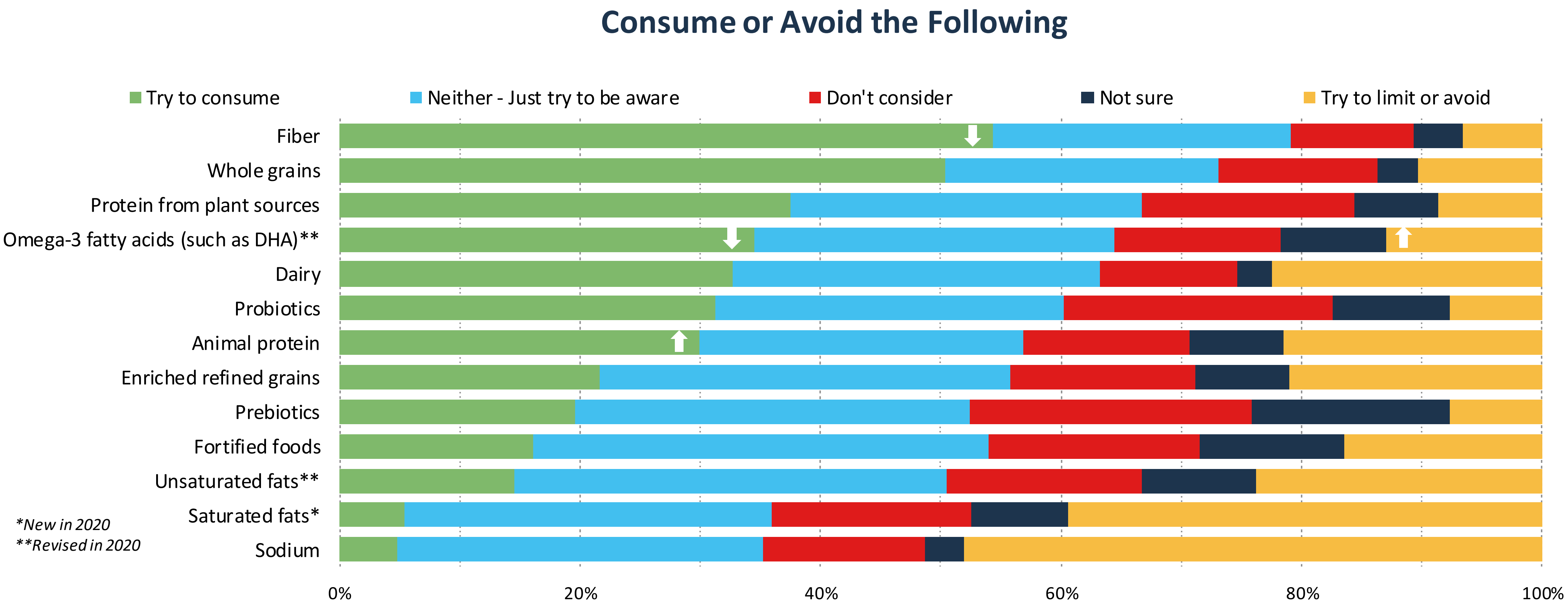
The perceived healthfulness of fiber and omega-3s are down from 2019; animal protein is up



Q33 (REVISED TREND): How would you rate the healthfulness of each of the following? (n=1,011)

In line with what is considered healthiest, fiber, whole grains, and protein from plant sources are the most sought after

Consumers age 50+ are more likely to try to consume fiber, whole grains, and omega-3 fatty acids



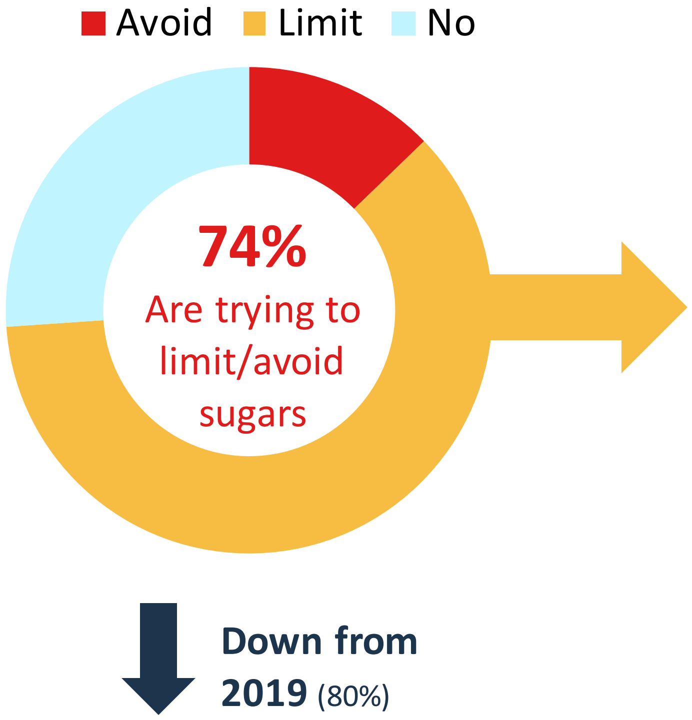
Q34 (TREND): Do you generally try to consume or avoid the following? (n=1,011)

Sugars and Sweeteners

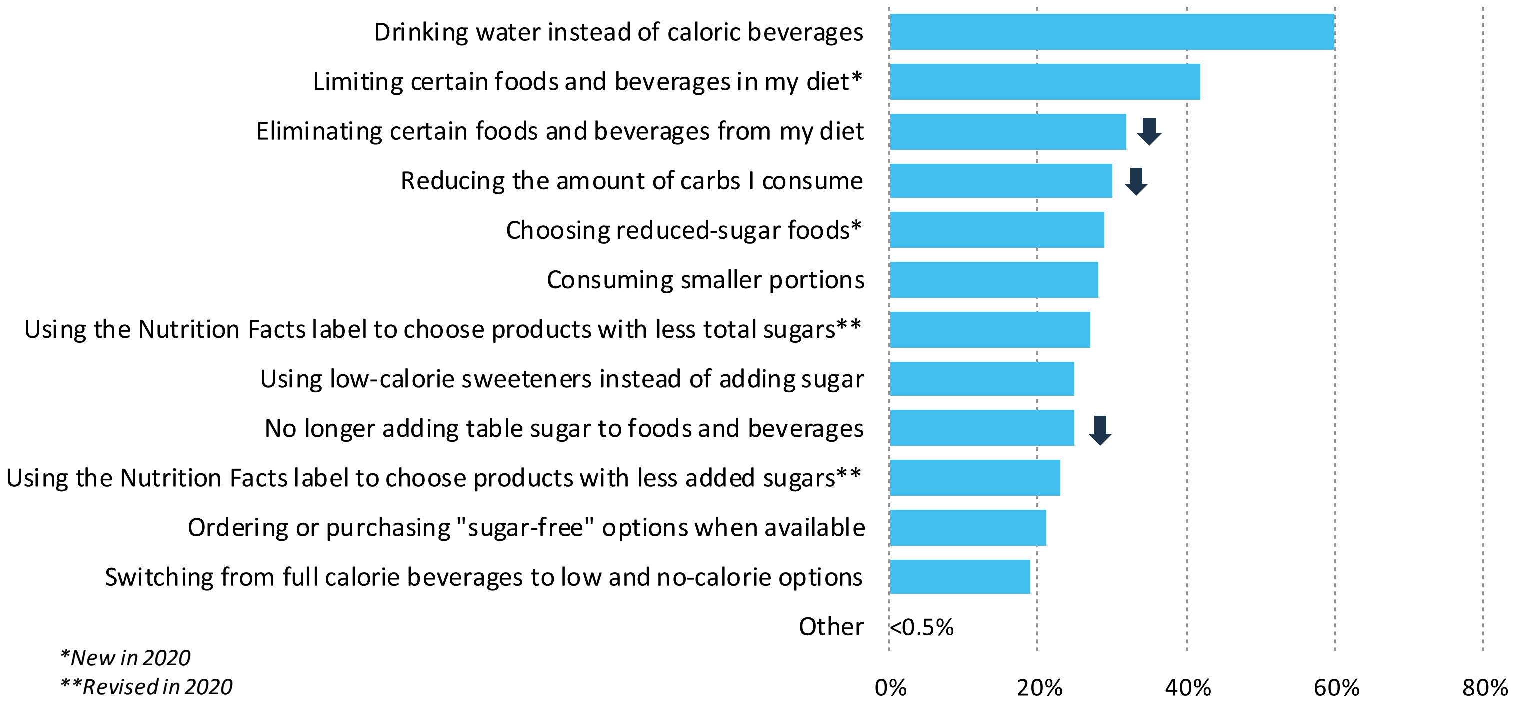
Fewer are trying to limit/avoid sugars in their diet in 2020

Consumers with a spouse/partner are more likely to say that they are limiting/avoiding sugars

Limiting/Avoiding Sugars in Diet



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



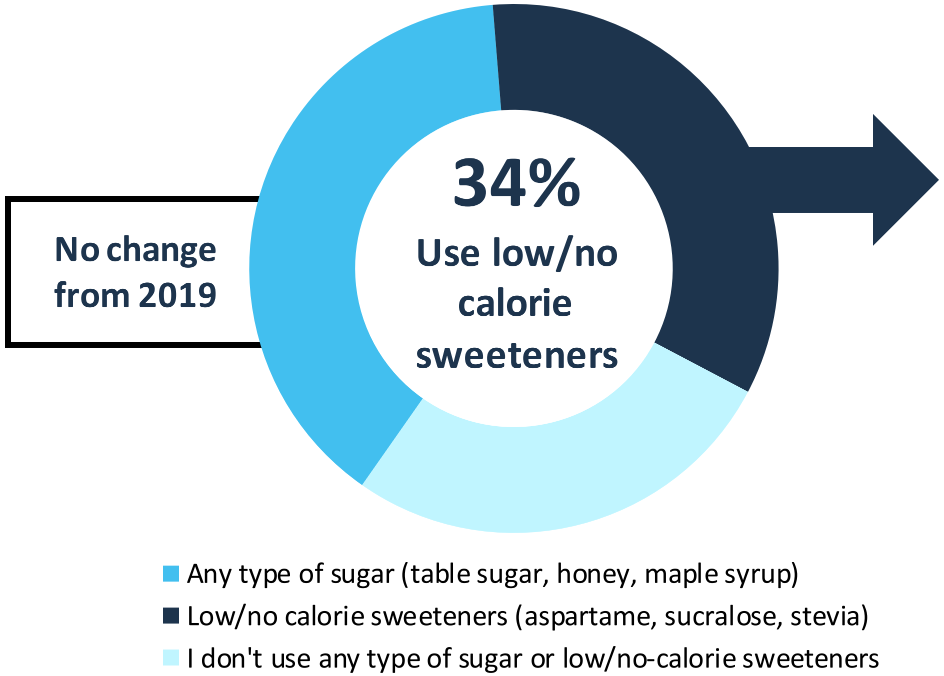
*New in 2020
**Revised in 2020

Q37 (TREND): Are you trying to limit or avoid sugars in your diet? (n=1,011)
Q38 (REVISED TREND): What action(s) are you taking to limit or avoid sugars? Select all that apply. (Of those limiting/avoiding sugars, n=737)

Preferences for sugar vs. low/no calorie sweeteners has remained stable

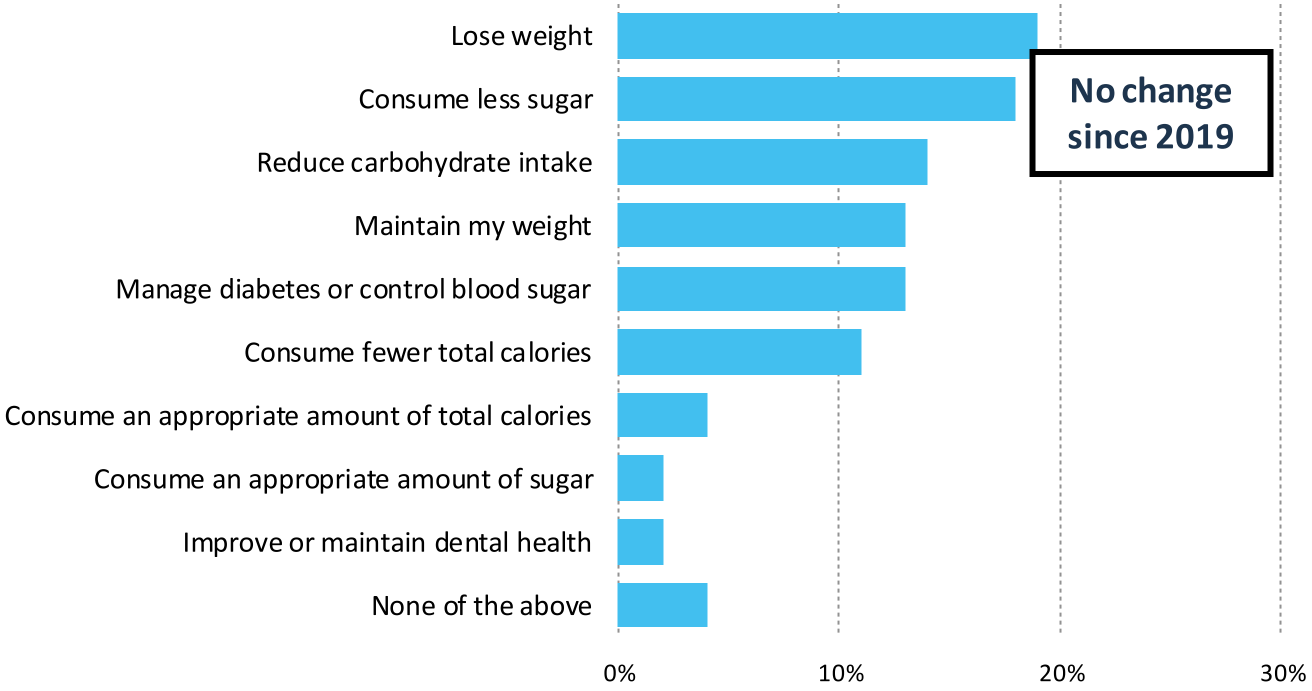
Men and single consumers are more likely than women or those with a spouse/partner to use sugar

Sweeteners Likely to Use



Perceived Benefits of Using Low/No-Calorie Sweeteners

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

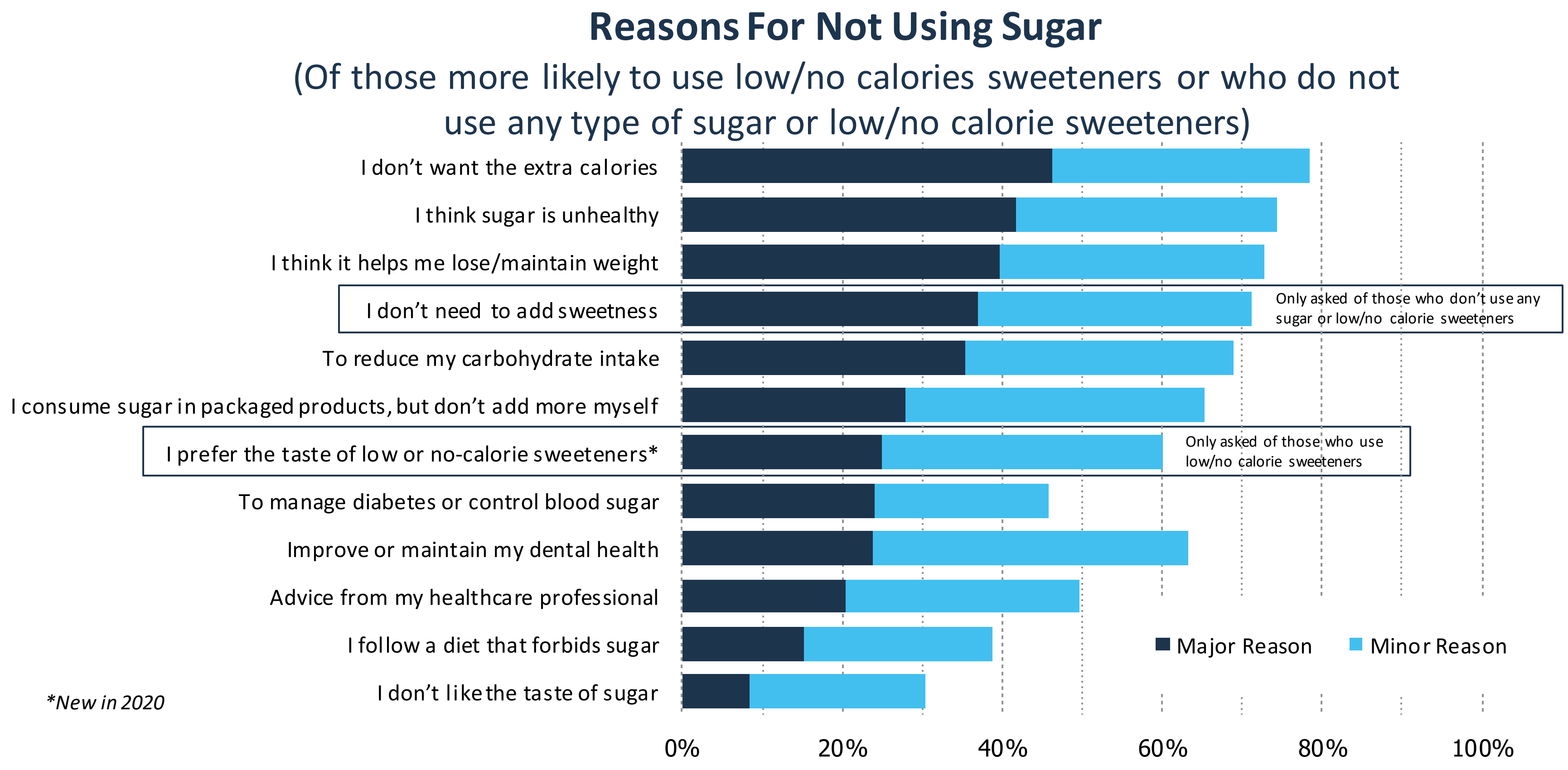


Q39 (TREND): Which of the following are you more likely to use to sweeten foods and/or beverages? (n=1,011)

Q42 (TREND): Which of the following, if any, do you believe consuming low/no-calorie sweeteners helps you do? Select top answer. (Of those who consume sweeteners, n=342)

Those who don't use sugar are most likely to not want the extra calories or to think sugar is unhealthy

Women are more likely to avoid sugar to prevent extra calories, lose weight, and to reduce carb intake



*New in 2020

"I think it helps me lose/maintain weight" is down from 70% in 2019 to 60% in 2020

"I don't need to add sweetness" is down from 79% in 2019 to 71% in 2020

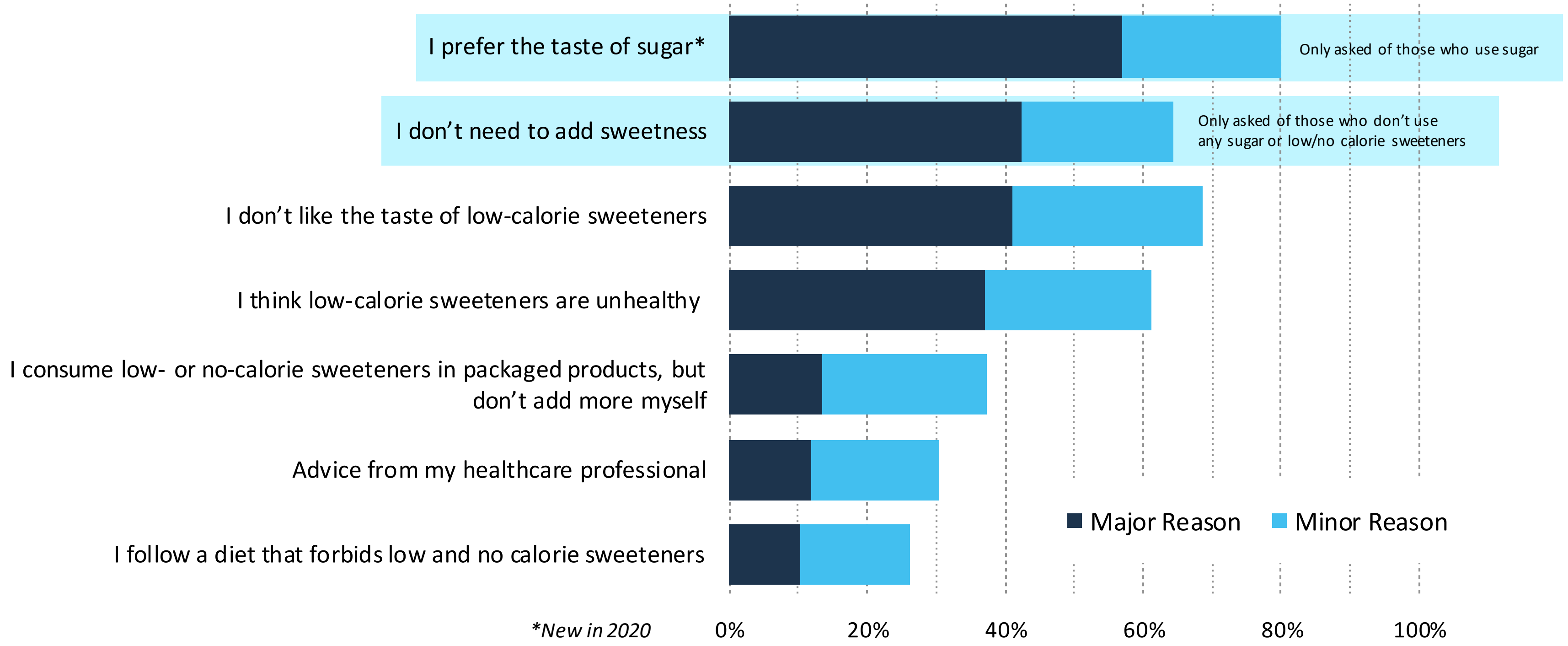
Trend vs. 2019
Of those who don't use <u>either</u> sugar or low/no calorie sweeteners:

Q40 (REVISED TREND): Why (don't you use/do you not prefer to use) any type of sugar (ex. table sugar, honey, maple syrup) to sweeten your foods and/or beverages? (Of those more likely to use low/no calories sweeteners or do not use any type of sugar or low/no calorie sweeteners, n=634)

Those not favoring low/no-cal sweeteners primarily point to reasons related to taste

Of those who don’t use either sugar or low/no-cal sweeteners, there has been a decrease in “not wanting to add sweetness or thinking that sweeteners are unhealthy

Reasons For Not Using Low/No-Calorie Sweetener
(Of those less likely to use low or no calorie sweeteners)



“I don’t need to add sweetness” is down from 78% in 2019 to 64% in 2020

“I think low-calorie sweeteners are unhealthy” is down from 73% in 2019 to 63% in 2020

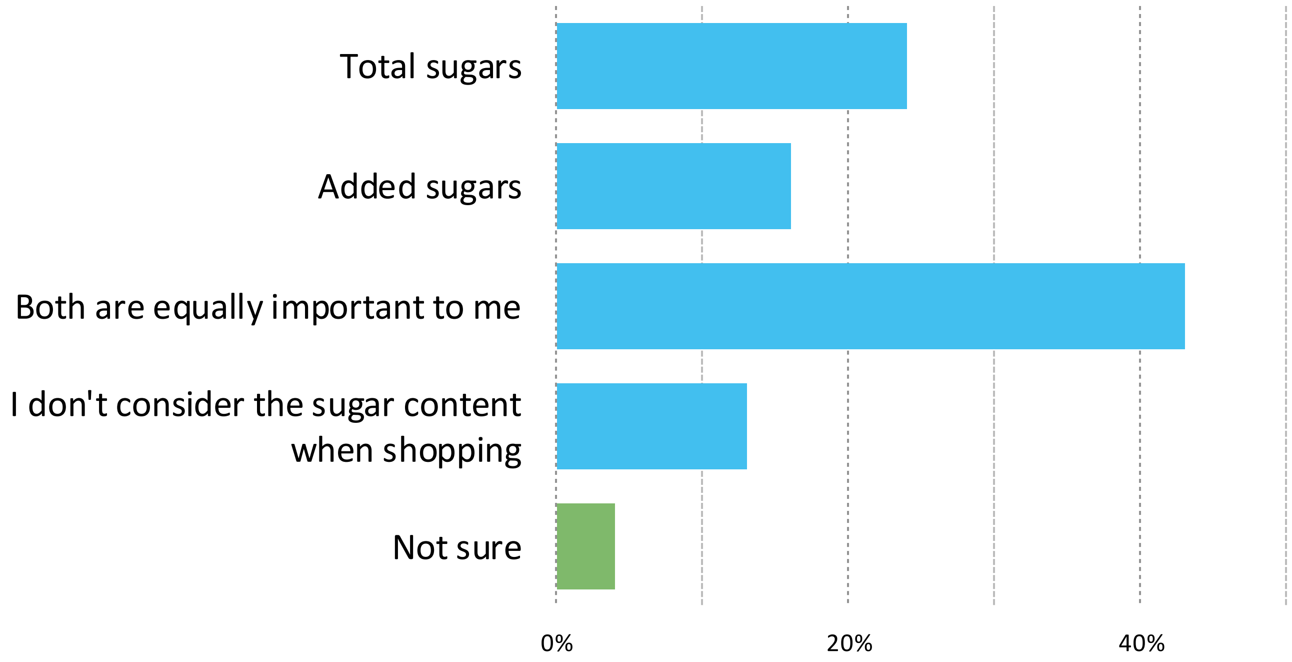
Trend vs. 2019
Of those who don’t use <u>either</u> sugar or low/no calorie sweeteners:

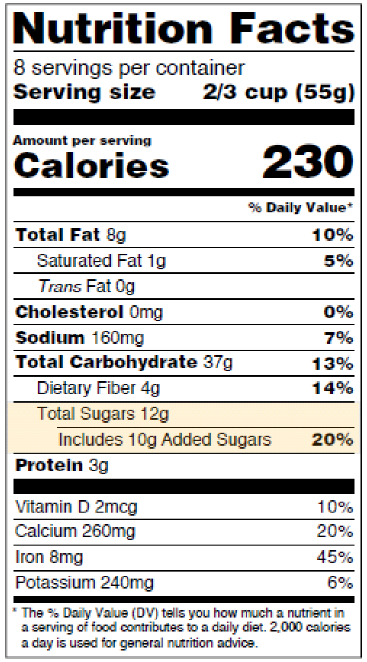
Q41 (REVISED TREND): Why (don't you use/do you not prefer to use) any type of low or no calorie sweeteners (ex. aspartame, sucralose, stevia leaf extract) to sweeten your foods and\or beverages? (Of those less likely to use low or no calorie sweeteners, n=669)

4 in 10 consumers consider total sugars and added sugars equally important information on labels

More consumers say they would consider total sugars than do added sugars specifically

Information Most Likely to Consider Related to Sugar Content When Shopping



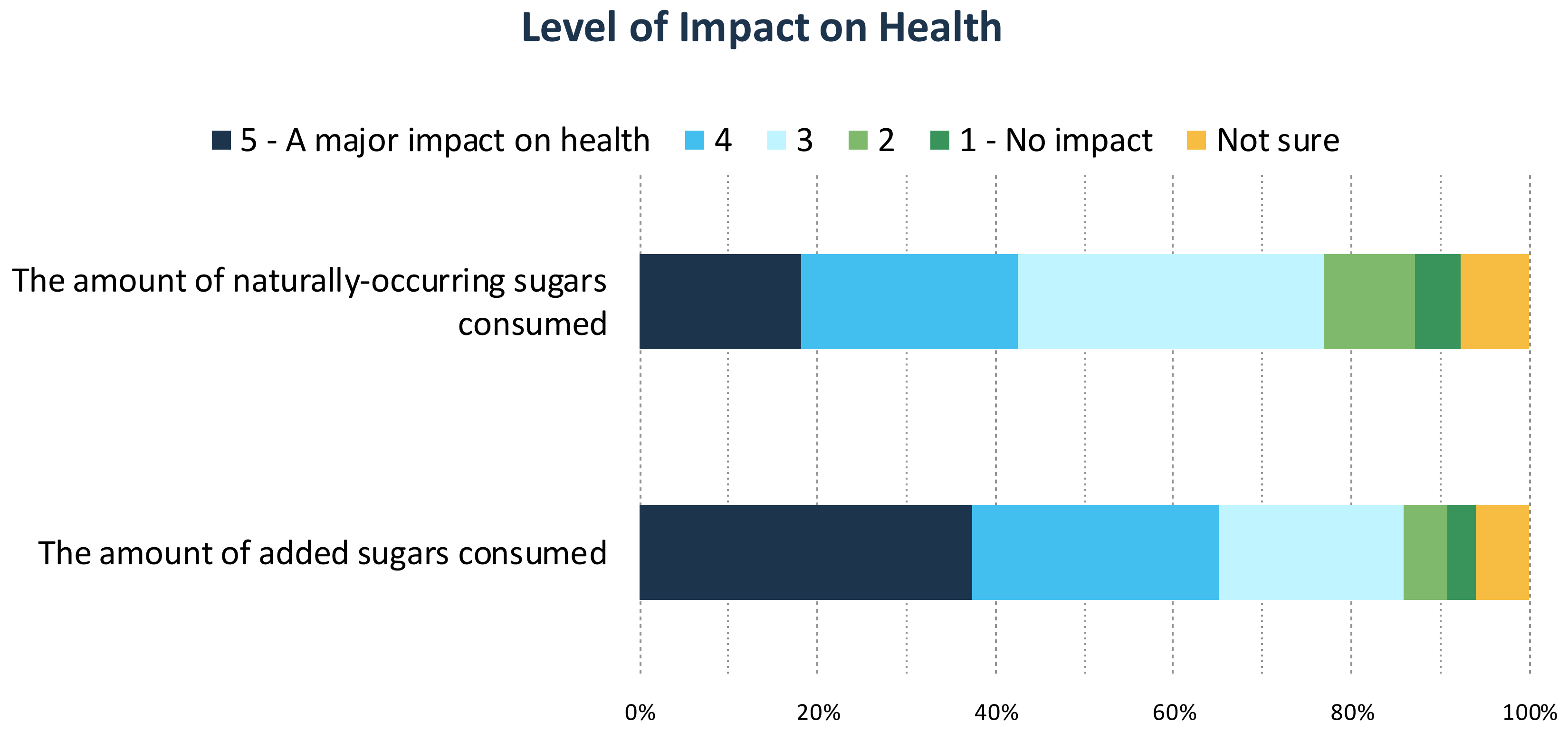


48% of women say total sugars and added sugars are equally important when shopping for packaged products (vs. 39% of men)

Q44: One of the changes on the new Nutrition Facts label is that "added sugars" is identified separately from "total sugars." When shopping for packaged foods and beverages, which information on the Nutrition Facts label are you most likely to consider related to sugar content? (n=1,011)

More consumers see added sugars as having a significant impact on their health vs. naturally-occurring sugars

While 37% see added sugars as having a major impact (5 of 5) on their health, only close to 1 in 5 (18%) say the same about naturally occurring sugars



49% of consumers who have tried a diet in the past year say the amount of naturally-occurring sugars consumed has an impact on health (vs. 38% who haven't)

68% of non-Hispanic whites say the amount of added sugars consumed has an impact on health (vs. 55% of African Americans)

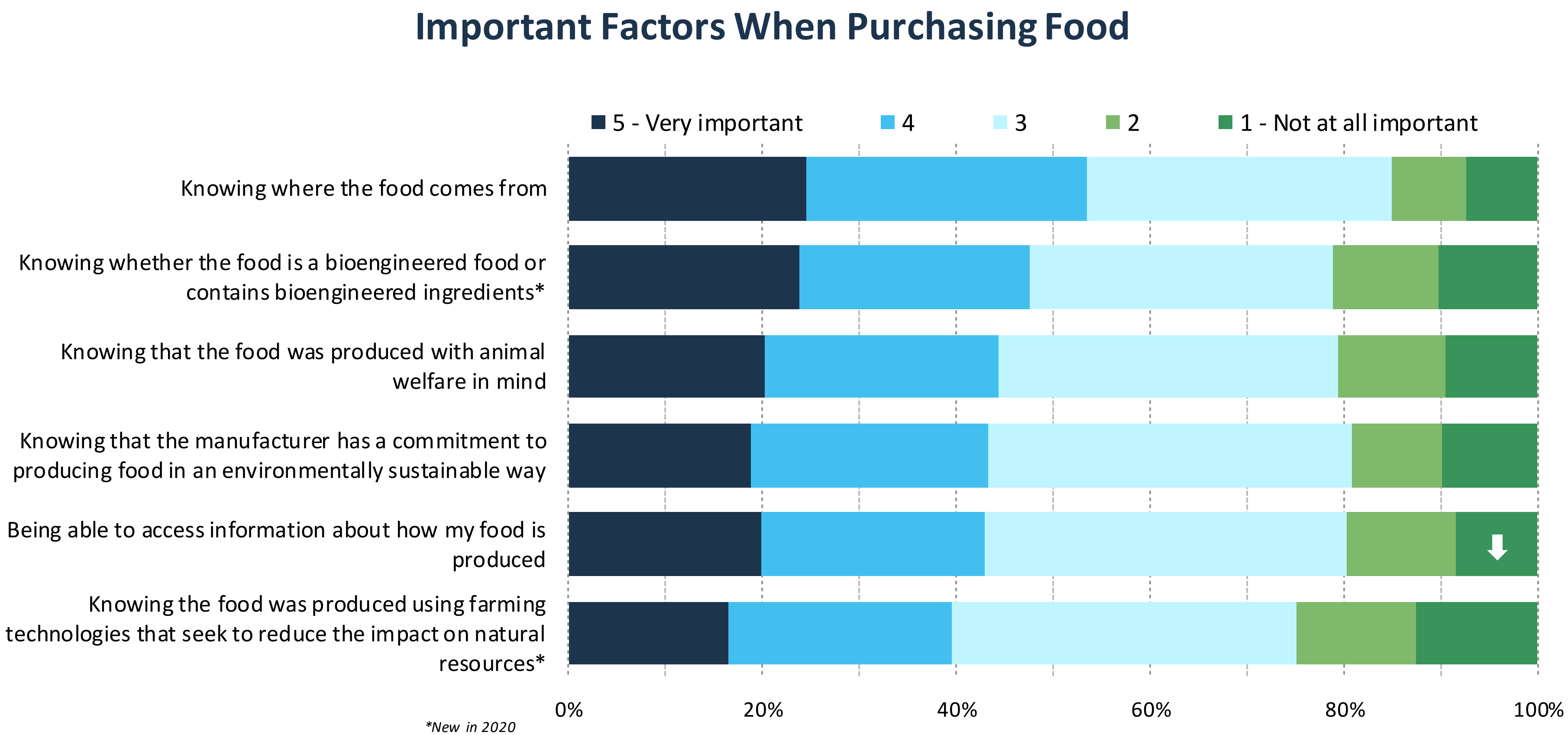
71% of consumers with a college degree say the amount of added sugars consumed has an impact on health (vs. 62% with less than a college degree)

Q43: How much of an impact do you think the following have on your health? (n=1,011)

Food Production

The influence of these food production factors has remained stable from 2019

More than half say knowing where the food comes from is an important factor



*New in 2020

51% of parents with children <18 years indicate knowing that the food/beverages purchased was produced with animal welfare in mind is important (vs. 42% without children)

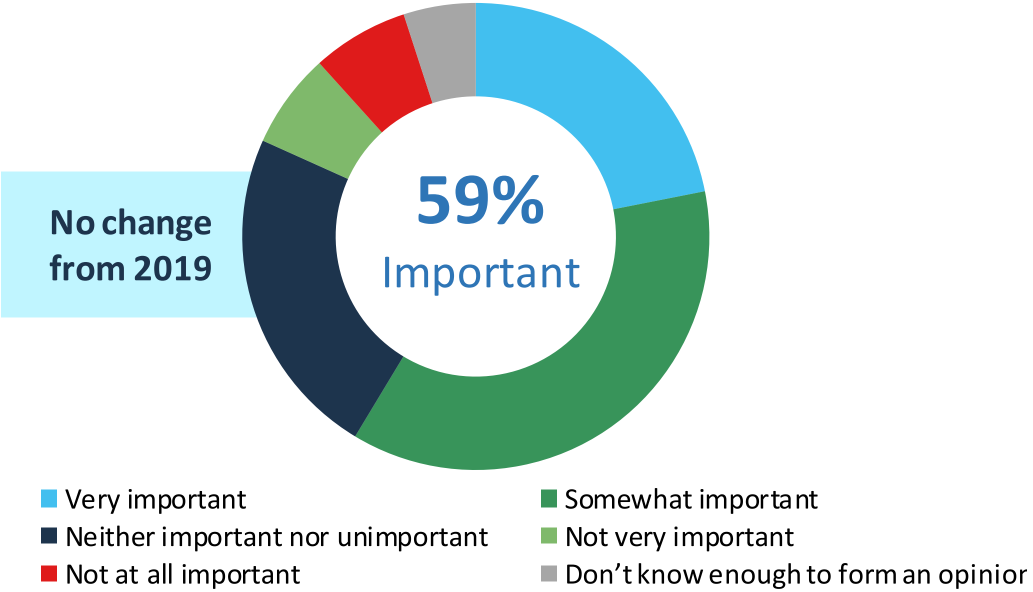
Consumers who have tried a diet in the past year are more likely than those who haven't to indicate knowing where the food comes from (59% vs. 49%), knowing whether the food is bioengineered (54% vs. 43%), and knowing that the manufacturer has a commitment to producing in an environmentally sustainable way (52% vs. 37%) is important

Q45 (TREND): How important are the following factors in your decision to purchase a food or beverage? (n=1,011)

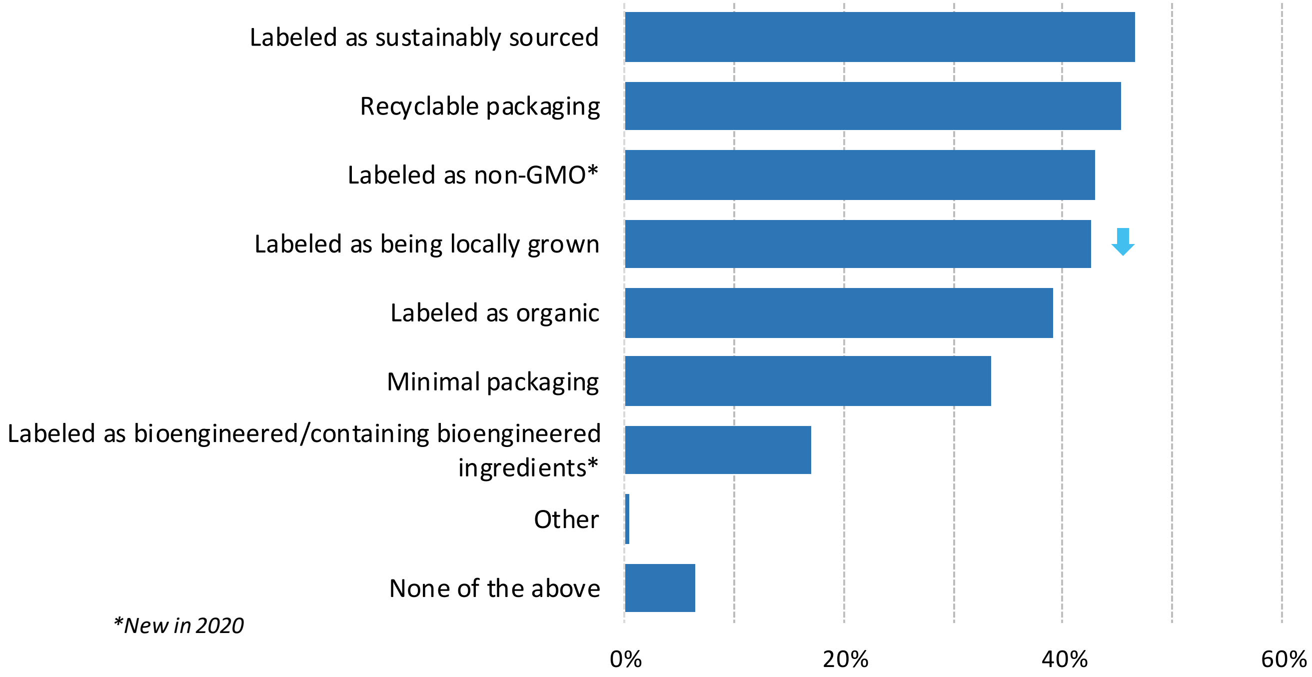
The importance of sustainability has remained the same vs. 2019, even though it is slightly more of a factor for purchases

Those who are following a diet are more likely to also consider environmental sustainability important

Importance of Environmental Sustainability in Food Products Purchased



Perceived Factors to Know if a Product is Produced in an Environmentally Sustainable Way (Of those who say it's important their food be produced sustainably)



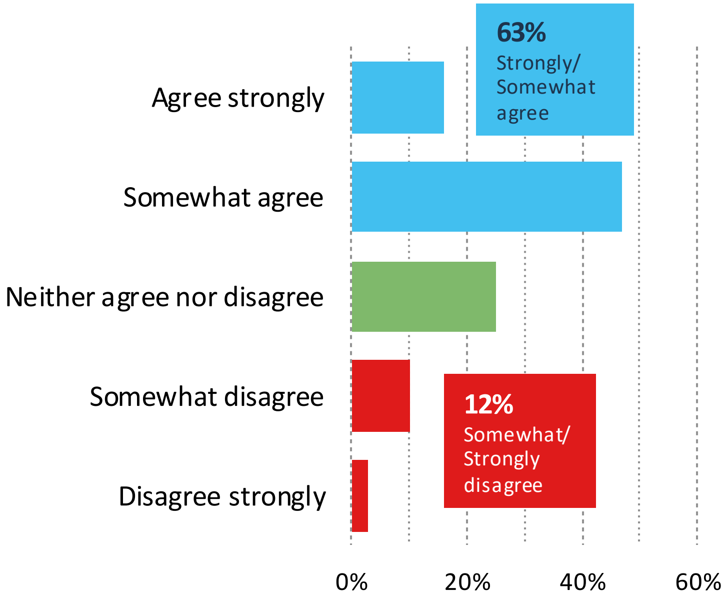
Q46 (TREND): How important is it to you that the food products you purchase or consume are produced in an environmentally sustainable way? (n=1,011)
Q47 (REVISED TREND): You mentioned that it is important to you that food products are produced in an environmentally sustainable way. When shopping for foods and beverages, which of the following do you look for as a way to know that a product is produced in an environmentally sustainable way? Select all that apply. (Of those who say it's important their food be produced sustainably, n=565)

As in 2019, more than 6 in 10 find it hard to know whether their food choices are environmentally sustainable

Of those who agree with this sustainability confusion, 7 in 10 say it would influence their decisions more if it was easier to know

Agree or Disagree:

"It is hard for consumers to know whether the food choices they make are environmentally sustainable"



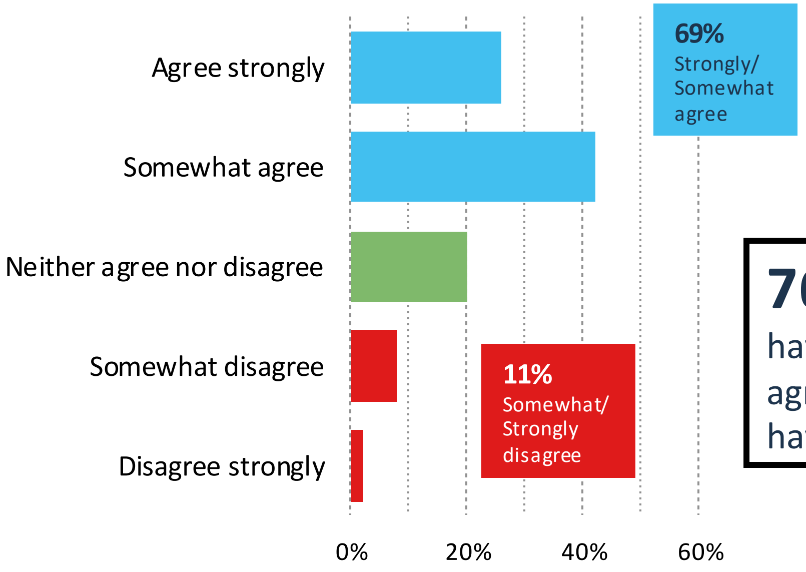
No change in agreement for either statements since 2019

67% of women agree (vs. 59% of men)

68% of consumers with spouses/partners agree (vs. 57% of single consumers)

Agree or Disagree:

"If it was easier to know whether my food choices were environmentally sustainable, it would have a greater influence on the choices I make" (Of those who agree it is hard to know)



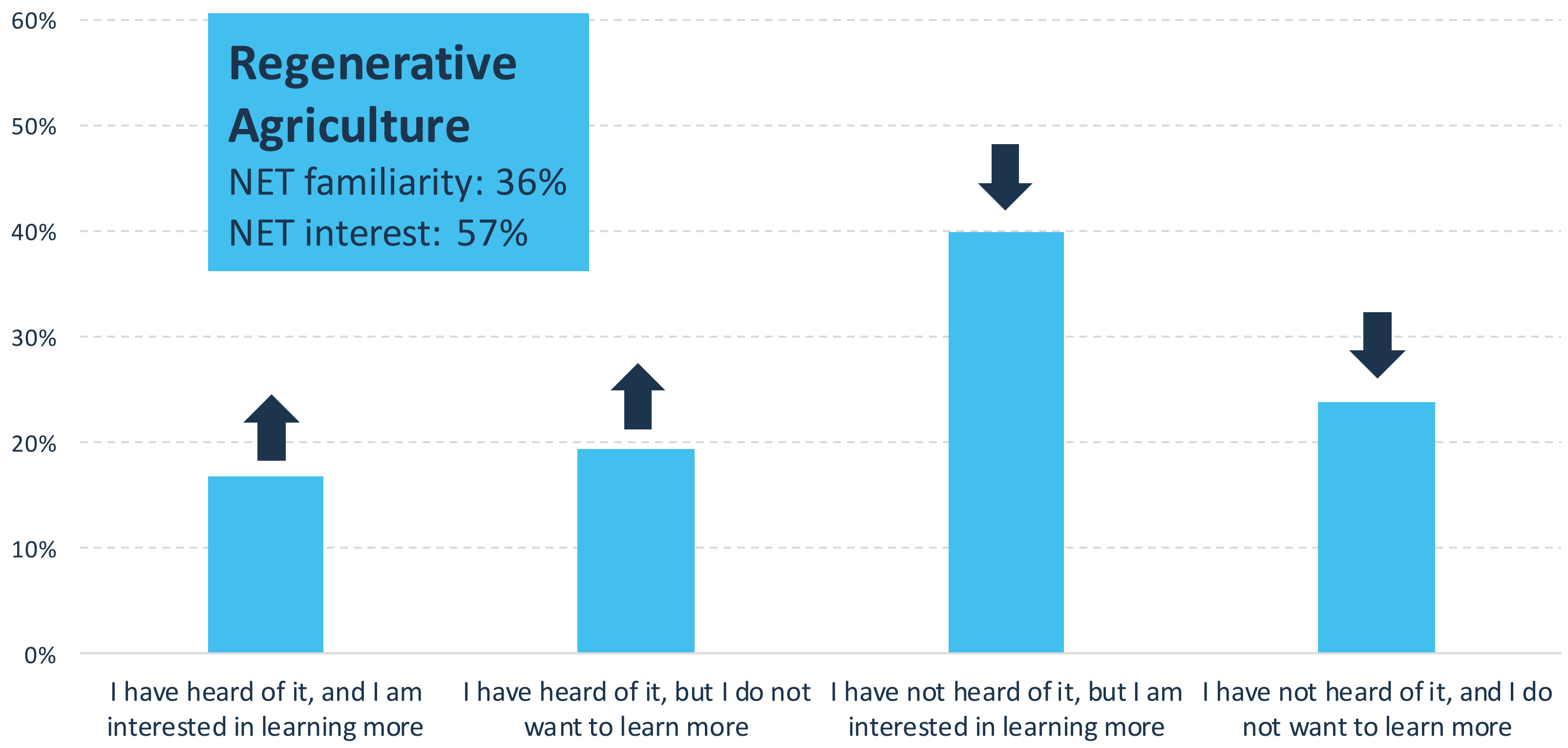
76% of those who have tried a diet agree (vs. 62% who haven't)

Q4 (TREND): Do you agree or disagree with the following statement? It is hard for consumers to know whether the food choices they make are environmentally sustainable." (n=1,011)
Q5 (TREND): Do you agree or disagree with the following statement? "If it was easier to know whether my food choices were environmentally sustainable, it would have a greater influence on the choices I make." (Of those who agree is it hard to know, n=646)

Familiarity with regenerative agriculture is up significantly

Younger consumers are much more likely to have heard of the concept

Familiarity and Interest in Regenerative Agriculture



Familiarity is up from 2019 (22%)

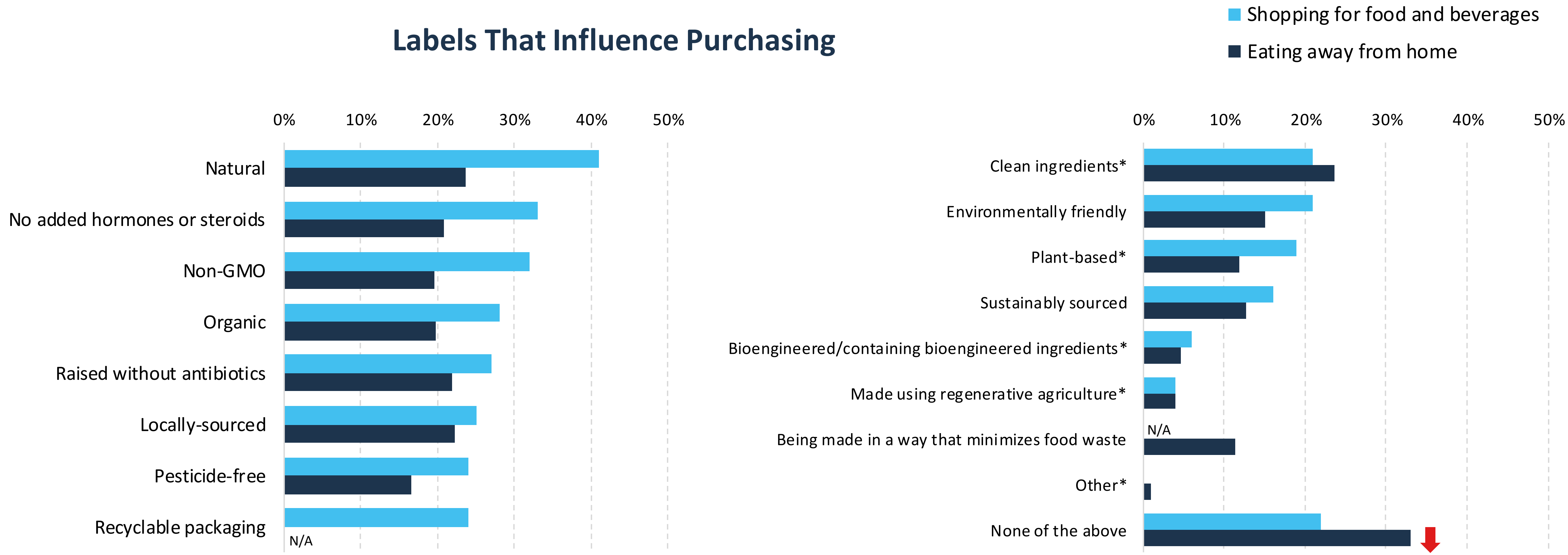
71% of consumers ages 50+ have **not** heard of regenerative agriculture (vs. 57% under age 35)

44% of consumers who grocery shop online at least once a month have heard of regenerative agriculture (vs. 29% who never shop online)

Q48 (REVISED TREND): Which of the following best describes your familiarity and interest in the practices of "regenerative agriculture" (e.g., agricultural practices that seek to maintain and enhance the health of the soil)? (n=1,011)

“Natural” label is most influential both when shopping and when purchasing food prepared outside the home

The influence of each label has remained stable vs. what was observed in 2019



**New in 2020*

Q49 (REVISED TREND): Which of the following, if any, do you do on a regular basis (that is, most times when you shop for foods and beverages)? Select all that apply. Buy foods and beverages because they are advertised on the label as…(Split Sample A, n=498)
Q50 (REVISED TREND): Which of the following, if any, do you do on a regular basis (that is, most times when you eat away from home)? Select all that apply. Buy food prepared outside your home (such as at a restaurant or ordered for takeout/delivery) because they advertised their foods and beverages as… (Split Sample B, n=513)

Confidence as a result of antibiotics regulation has not changed since 2019

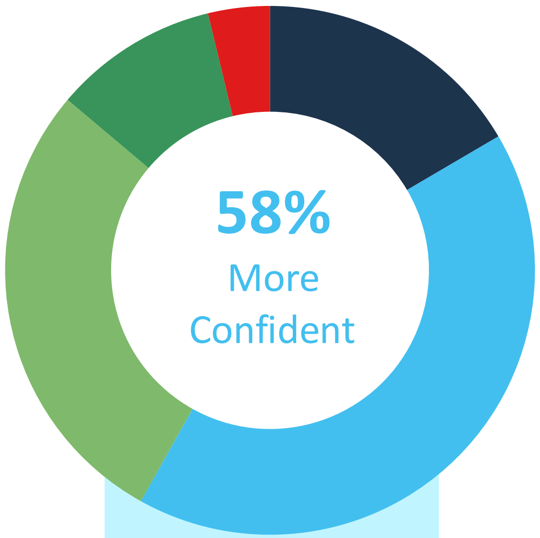
Nearly 6 in 10 feel more confident as a result of prohibiting growth-promotion uses of antibiotics

Change in Confidence Since Regulation of Antibiotics

Three years ago, the US Food and Drug Administration 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? Are you…?

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



No change from 2019 (57%)

65% of consumers with a college degree feel more confident (vs. 55% with less than a college degree)

65% of consumers who have tried a diet in the past year feel more confident (vs. 53% who haven't)

Q51 (TREND): Three years ago, the US Food and Drug Administration 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? Are you…? (n=1,011)

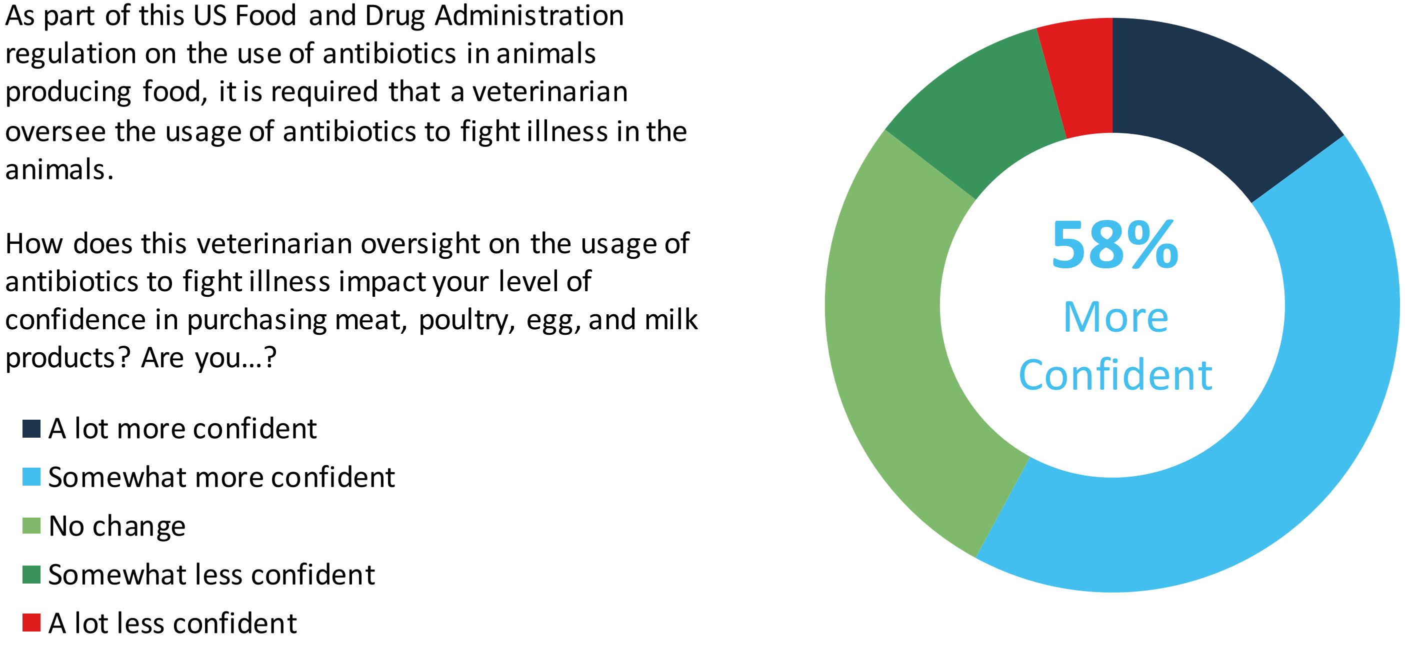
Veterinarian oversight also increases confidence for over half

Dieters are more likely to express greater confidence as a result of the oversight

Change in Confidence Regarding Veterinarian Oversight

As part of this US Food and Drug Administration regulation on the use of antibiotics in animals producing food, it is required that a veterinarian oversee the usage of antibiotics to fight illness in the animals.

How does this veterinarian oversight on the usage of antibiotics to fight illness impact your level of confidence in purchasing meat, poultry, egg, and milk products? Are you…?



64% of consumers who have tried a diet in the past year feel more confident (vs. 53% who haven't)

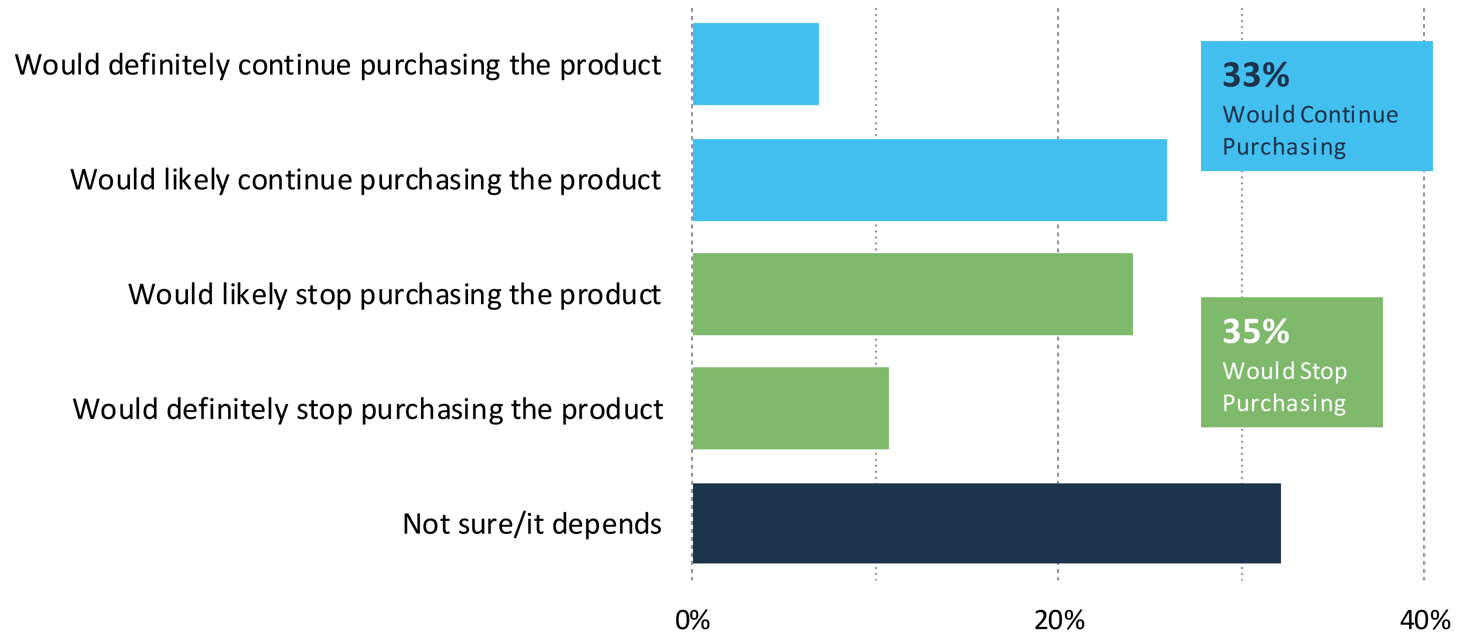
24% of parents with children under 18 indicate that they are **less** confident (vs. 11% without children)

Q52: How does this veterinarian oversight on the usage of antibiotics to fight illness impact your level of confidence in purchasing meat, poultry, egg, and milk products? Are you…? (n=1,011)

Consumers are split on whether a BE label would affect their decision to purchase a product they had previously enjoyed

Consumers under age 50 are significantly more likely to continue purchasing the product vs. those 50+

Reaction to Seeing a Bioengineered Label on a Previously Purchased Product



40% of consumers under 50 indicate that they would continue purchasing the product (vs. 25% ages 50+)

39% of consumers with a college degree indicate that they would continue purchasing the product (vs. 30% with less than a college degree)

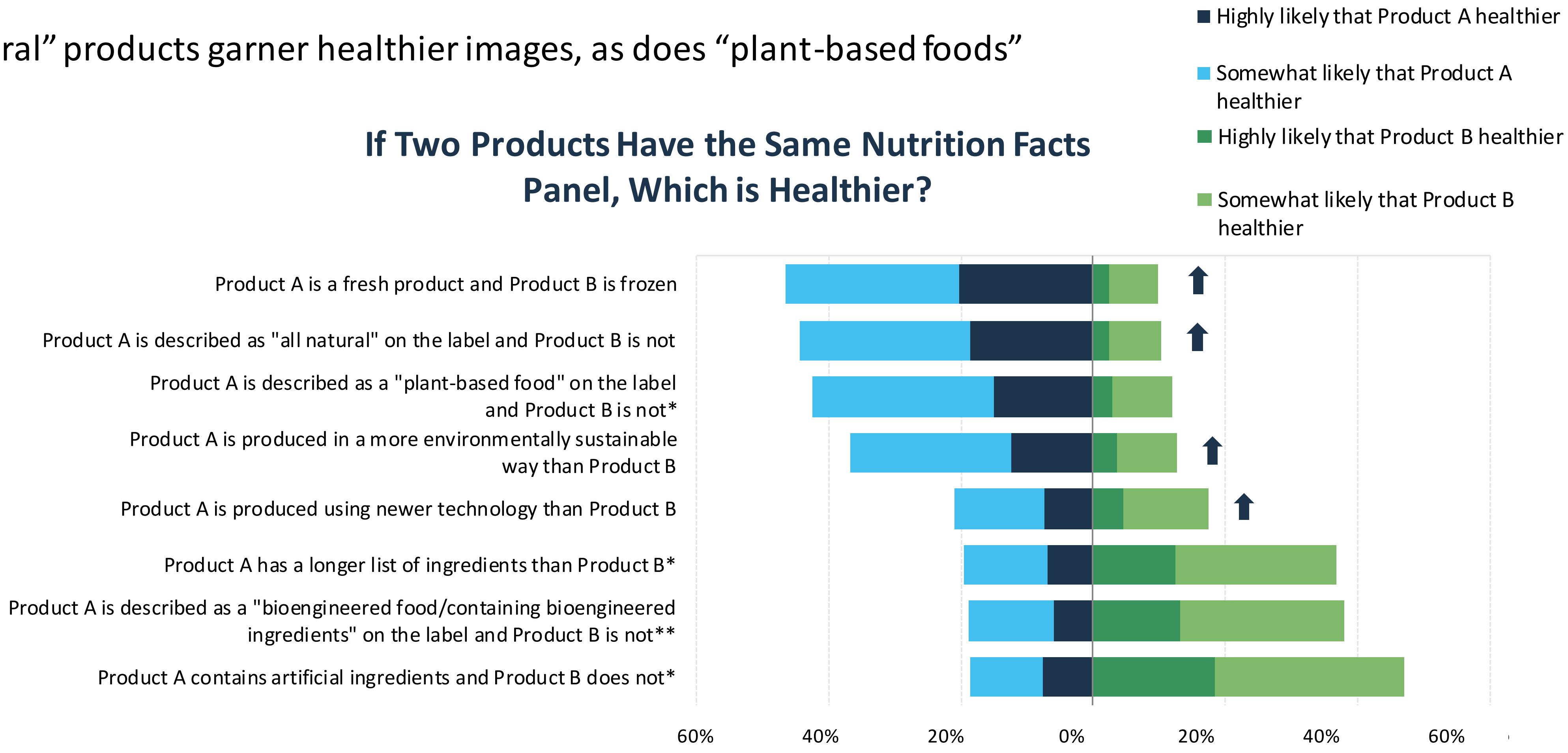
Q53: Over the next year you may see new labeling on foods and beverages indicating that it is bioengineered or contains bioengineered ingredients. If you saw this label on a product that you have previously purchased and enjoyed, what would be your reaction? (n=1,011)

Consumers perceive health differences in products even if they have the same Nutrition Facts Panel

Fresh and “all natural” products garner healthier images, as does “plant-based foods”

Nutrition Facts	
Serving size	1 container (200g)
Amount per serving	
Calories	170
	% Daily Value*
Total Fat 1.5g	2%
Saturated Fat 1g	5%
Trans Fat 0g	
Cholesterol 10mg	3%
Sodium 85mg	4%
Total Carbohydrate 33g	12%
Dietary Fiber 0g	0%
Total Sugars 10g	
Includes 0g Added Sugars	0%
Protein 5g	
Vitamin D 4mcg	20%
Calcium 260mg	20%
Iron 0mg	0%
Potassium 260mg	6%
Vitamin A 135mcg	15%

* The % Daily Value 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.



**New in 2020*

***Revised in 2020*

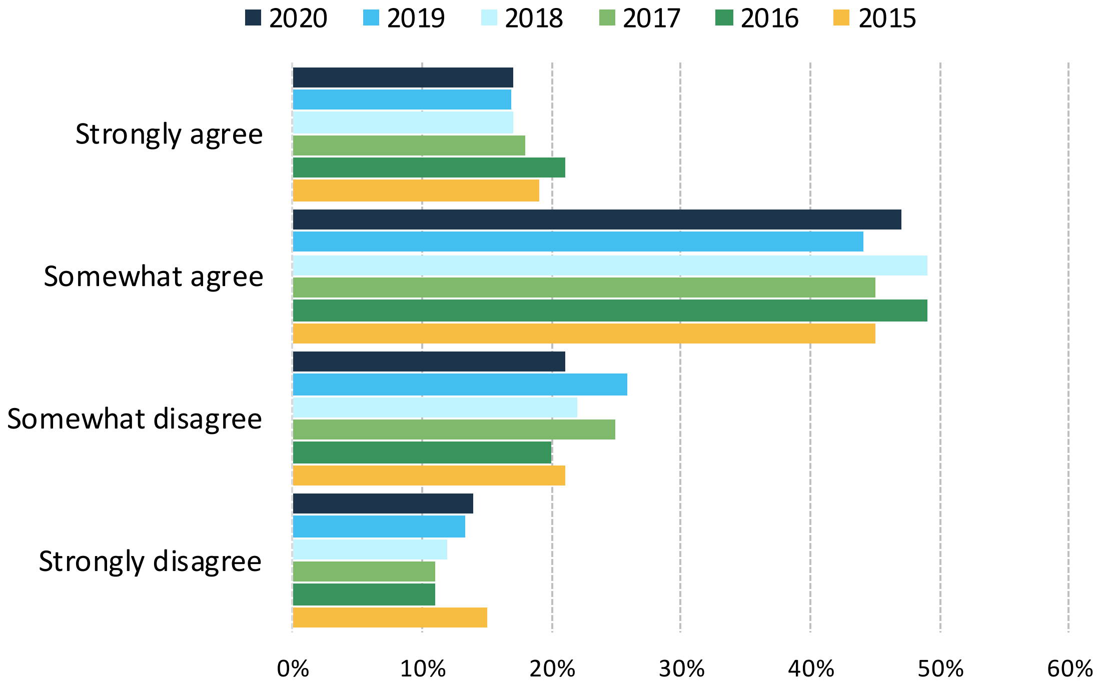
Q14 (TREND): Please consider the following food purchasing situation: Imagine you came across two food products that had the exact same Nutrition Facts panel (see below). Would any of the following details lead you to believe that one of the products was more likely to be healthier? (n=1,011)

Caffeine Consumption

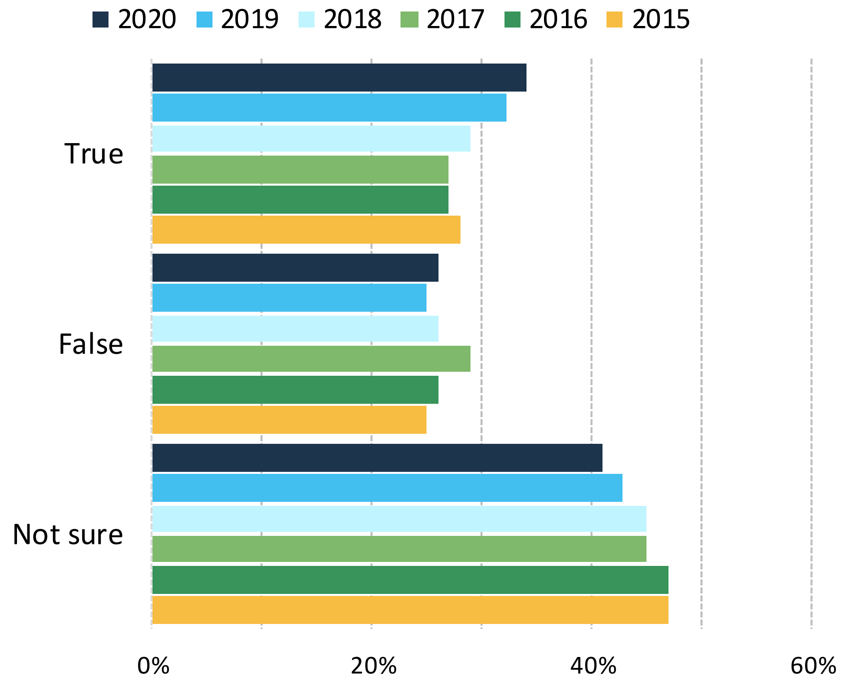
Over the past 5 years consumers have trended towards believing that naturally-occurring and added caffeine have the same effect

Those in very good health are more likely than those in fair/poor health to believe that caffeine is naturally occurring

Knows the Amount of Caffeine in Foods and Beverages Consumed



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



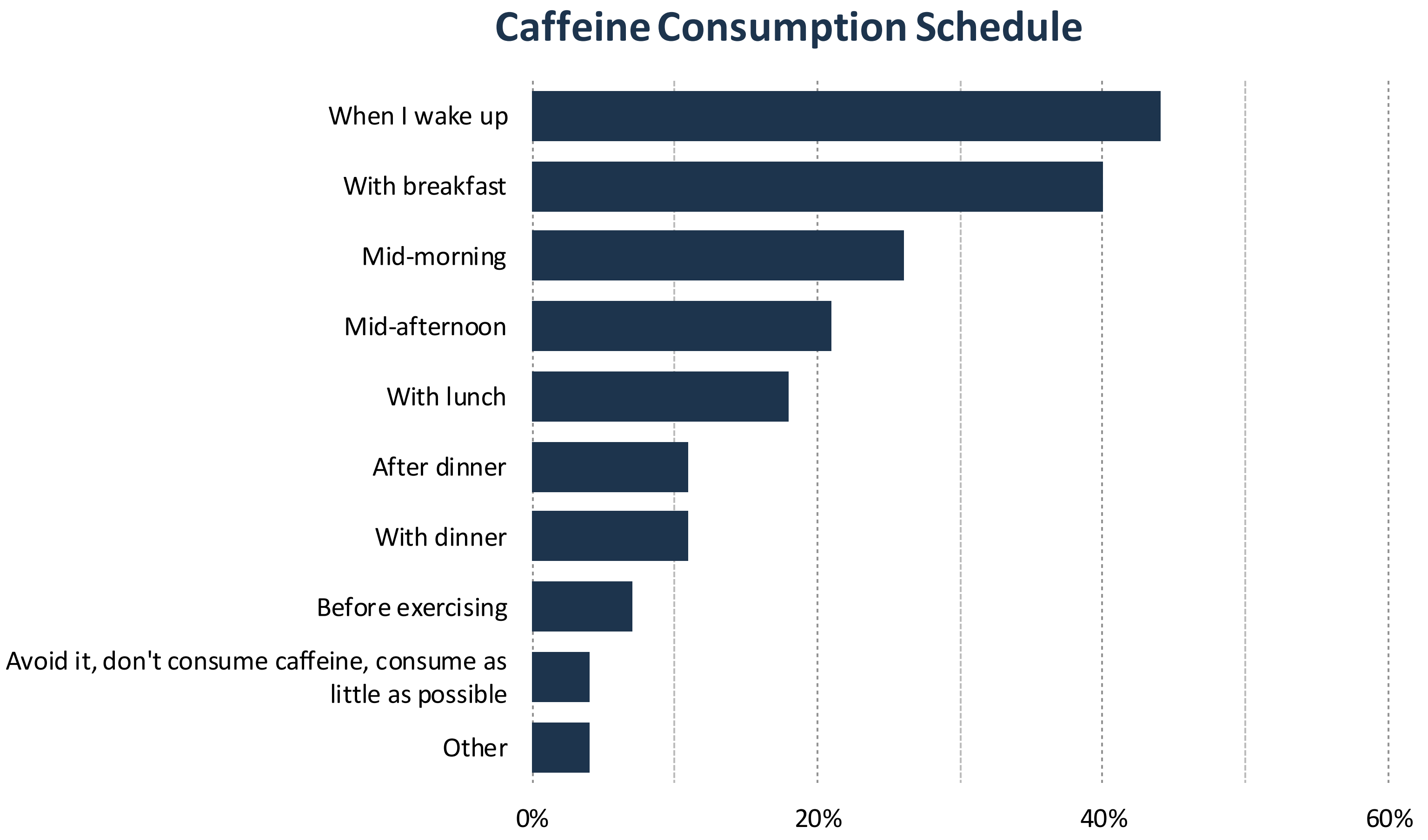
No change from 2019

40% of men indicate that the statement is true (vs. 28% of women)

Q58 (TREND): 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. (Of those who consume caffeine, n=950)
Q59 (TREND): 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=1,011)

Caffeine consumption differs by gender and for those with and without children

Men are much more likely than women to consume caffeine with a breakfast, while parents are much more likely to need caffeine with lunch



Q60: When do you consume caffeine? Select all that apply. (Of those who consume caffeine, n=950)

47% of consumers with less than a college degree who consume caffeine do so **when they wake up** (vs. 39% with a college degree)

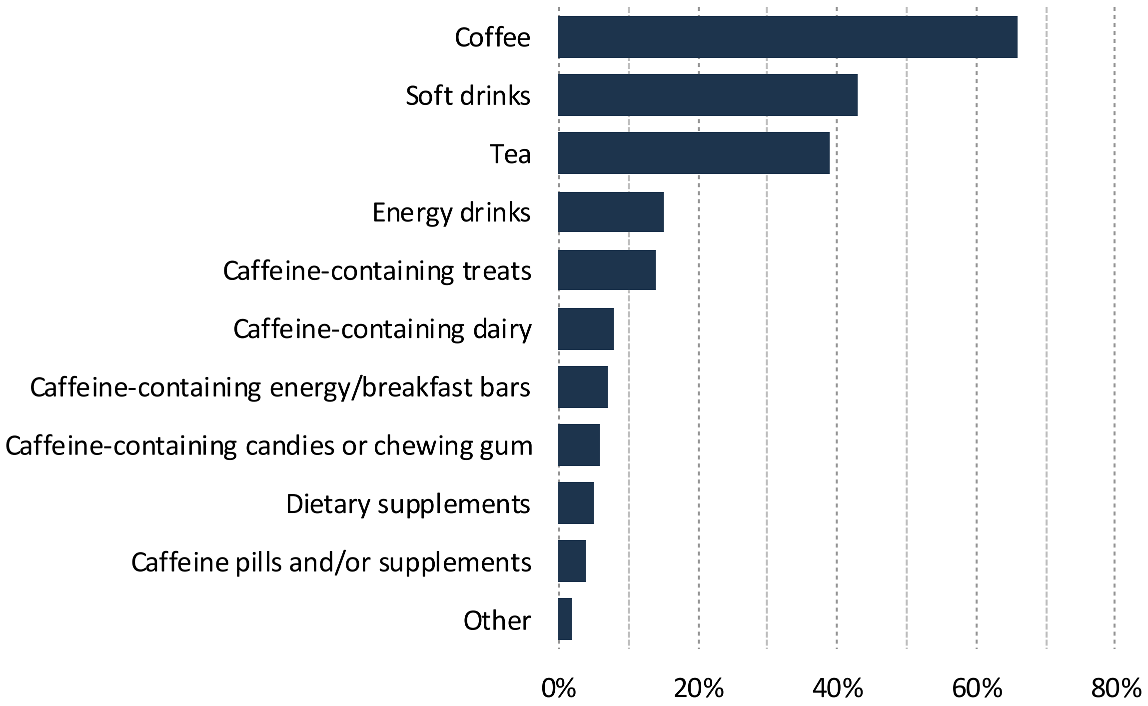
47% of men who consume caffeine do so with breakfast (vs. 34% of women)

26% of parents with children under 18 who consume caffeine do so with lunch (vs. 15% without children)

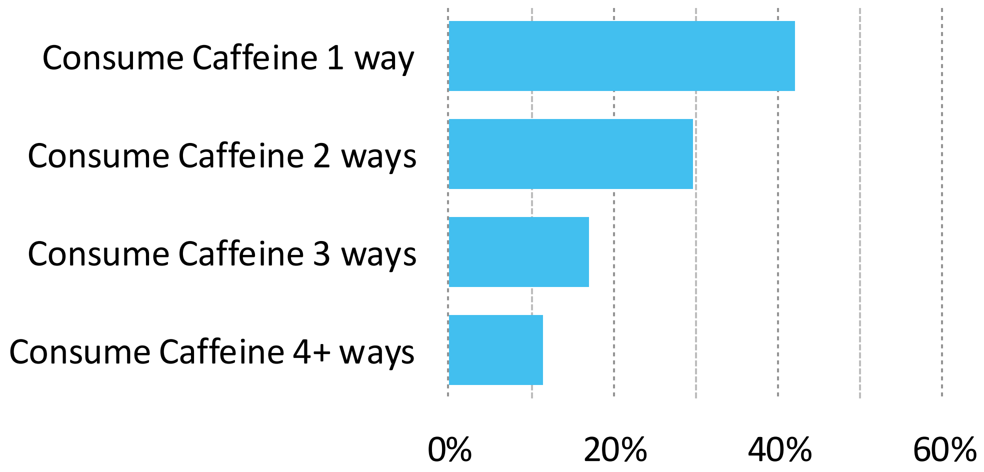
Not surprisingly, coffee, soft drinks and tea are the most common sources of caffeine consumption

Those who haven't followed a diet in the past year are more likely than those who have to report that they consume coffee and soda

Type of Caffeine Product Consumed



67% of parents with children <18 who consume caffeine do so in multiple ways (vs. 55% without children)



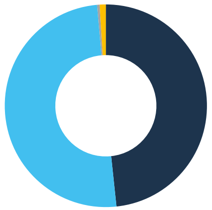
Q61: Which of the following sources of caffeine do you consume? Select all that apply. (Of those who consume caffeine, n=950)

Demographics

Demographics

Gender

Male	49%
Female	51
Other	<0.5
Prefer not to say	1



Age

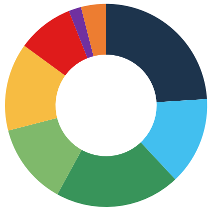
18 to 34	30%
35 to 49	25
50 to 64	25
65 to 80	19

Race/Ethnicity (Multiple responses accepted)

White	67%
Hispanic/Latino/Spanish descent	17
Black or African American	12
Asian or Pacific Islander	7
American Indian or Alaska Native	2
Other	1

Household Income

Less than $35,000	24%
$35,000 to $49,999	14
$50,000 to $74,999	20
$75,000 to $99,999	13
$100,000 to $149,999	14
$150,000 and above	9
Don't know	2
Prefer not to answer	4



Education

Less than high school	4%
Graduated high school	35
Some college	16
AA degree/technical/vocational	11
Bachelor's degree	23
Graduate/professional degree	10

Demographics

US Region

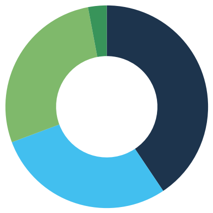
Northeast	17%
South	38
West	24
Midwest	21

Type of Location

Suburban	46%
Urban	26
Rural	15
Small town	13

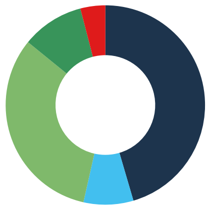
BMI Score

Normal or Low	41%
Overweight	29
Obese	28
Prefer not to answer height/weight	3



Marital Status

Married	45%
Living with partner	8
Single, never married	32
Divorced or separated	10
Widowed	4
Other	<0.5



Children's Ages

Newborn to 2 years old	5%
3 to 5 years old	6
6 to 8 years old	8
9 to 17 years old	16
18 or older	35
Do not have any children	41
Prefer not to say	2

Demographics

Diagnosed Medical Conditions (Multiple responses accepted)	
High blood pressure	25%
High cholesterol	19%
Stress/Anxiety/Depression	19%
Overweight/obesity	12%
Diabetes	9%
Gastrointestinal disorders	6%
Cancer/cancer survivor	6%
Food allergies	6%
Heart disease	4%
Osteoporosis	3%
Attention deficit hyperactivity disorder (ADHD)	2%
Stroke	2%
Decreased muscle strength/impaired mobility	1%
Alzheimer's disease/dementia	1%
Other	5%
None of the above	41%

Self-Reported Socioeconomic Standing	
10 – Top Rung	3%
9	6
8	12
7	20
6	22
5	16
4	9
3	7
2	3
1 – Bottom Rung	2

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