

2021 FOOD & HEALTH SURVEY

International Food Information Council

About IFIC



Our Mission

To effectively communicate sciencebased information about health, nutrition, food safety and agriculture



Our Vision

We envision a global environment where credible science drives food policy and consumer choice.

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Our Philosophy

We work to better the health and wellbeing of communities and to provide evidence-based information on health, nutrition and food safety for the public good.



Methodology



Online survey of 1,014 Americans ages
18 to 80. Fielding took place between
March 23 to March 31, 2021.

The survey took approximately 21 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 2020 Current Population Survey. Specifically, they were weighted by age, education, gender, race/ethnicity and region.

The survey was conducted by Greenwald Research, using Dynata's consumer panel.

Note: Significant changes in trend vs. 2020 (or in some cases prior years) are indicated where appropriate with up and down arrows or call-out boxes.

Suggested citation: International Food Information Council. 2021 Food & Health Survey. 19 May 2021. <u>https://foodinsight.org/2021-food-health-survey/</u>



Executive Summary



This year's Food and Health Survey marks the 16th time the International Food Information Council (IFIC) has surveyed American consumers to understand their perceptions, beliefs, and behaviors around food and food purchasing decisions.

The findings from this year's online survey of 1,014 Americans ages 18 to 80 focus on:

- The ongoing impact of COVID-19 on food and diet habits
- Perceptions of about health and nutrition, and how healthy food and healthy eating patterns are defined
- Food and beverage purchase drivers
- The importance of both environmental sustainability and social sustainability
- Eating patterns and diets, including what snacking looks like for Americans in 2021
- Health benefits consumers seek from food and how they get them
- How Americans approach sugar consumption and the use of low/no-calorie sweeteners
- Beliefs about food production and food technologies
- Views on food safety issues

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.



Executive Summary Key Fi

Key Findings

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

Pandemic diets and food habits that spiked in 2020 may be easing back to normal in 2021.

In April 2020, 85% of Americans reported having experienced some change to their habits surrounding eating or food preparation as a result of the pandemic. Now, one year later, there are still 72% who say the pandemic is changing the way they eat and prepare food. But there have also been significant decreases in many behaviors, such as cooking at home more than usual, washing produce more, snacking more, thinking about food more, and eating more than usual.

A third of Americans reported snacking more than usual in the spring of 2020; now, only 18% say this remains true. The percent who are thinking about food more than usual has gone from 27% to 13%.

There is also excitement about the possibility of getting back to normal life when the pandemic eventually subsides:

Americans are most excited about not having to wear a mask and not worrying about COVID-19 when shopping or at a restaurant. They also look forward to going out to restaurants more, eating/cooking with family more, and being able to attend larger gatherings with family and friends, like dinner parties, cookouts and holiday meals.

Those with children under 18 are especially excited about going out on date nights again, going out for drinks with friends, and getting back to a healthier diet (or starting one).

Online grocery shopping has considerably picked up steam a year into the pandemic.

Forty-two percent of Americans now say they shop online for groceries at least monthly (up from 33% in 2020 and 27% in 2019). Similarly, 20% shop online at least weekly (vs. 11% in 2020 and 13% in 2019). This trend appears to have taken off across the country.

Younger consumers, African Americans, and parents, in particular, tend to grocery shop online more frequently than others.



Three in 4 Americans have made a real effort to help their community during this year of crisis.

2020 was an unbelievably difficult year for many across the country, marked by a global pandemic, racial injustice and a deepening political divide. Yet, many Americans appear to have truly made an effort to help their community in this difficult time:

- 44% made an effort to support local restaurants
- 42% made an effort to tip restaurant servers/delivery people more
- 25% made an effort to buy food from local farmers
- 21% shopped/dined at minority owned restaurants/grocery stores
- 20% donated to or volunteered at a food charity or foodbank
- 18% helped people in their community who needed assistance to get food/groceries
- 12% made an effort to learn more about food-related social justice issues.

While this show of community caring is remarkable, there are still many dealing with the impacts of the crisis. In the last year, roughly 4 in 10 say they have purchased less healthy food than they would have if they could afford healthier options, purchased less food overall, worried about running out of food before they had the money to buy more and delayed buying needed food because of other expenses like rent or bills. Of those facing food insecurity, 75% say it is due at least in part to the pandemic (4 in 10 say the pandemic is a significant reason).

In comparison to 2018 (when IFIC last asked these questions in the Food and Health Survey), the *number* of people facing these food insecurity issues has not necessarily increased, however. The economic recovery from the COVID-19 pandemic has been imbalanced, with some segments of society able to easily transition to telework and not impacted by the employment shocks of 2020. Other groups, especially younger, lower income, minorities and those in service and entertainment industries have suffered disproportionately. In the Food and Health Survey, we can see this especially for African Americans: from 2018, the share of these consumers who "often" delayed buying food because of other expenses went from 10% to 21% in 2021. Among white consumers, the number only went from 11% to 12%.

Amazingly, however, those who experienced food insecurity as a result of COVID-19 are even more likely to have made an effort to help their community (86% vs. 68% of those who didn't experience a hardship).



Americans' definition of a "healthy food" has taken a more positive tone. Three in 4 are confident they can choose healthy foods.

When it comes to defining "healthy food," Americans have a variety of opinions. In 2016, consumers most identified with the negative: the absence of certain components, like fat and sugar content. This year, the definition takes a more positive tone: 27% say it is defined by the presence of healthful components (like fruits, veggies, and nutrients) (up from 17%) and 25% say it is the food that is simply "good for you" (up from 18%), while 25% say it is about the absence of certain components (down from 35%).

Americans define a "healthy eating pattern" with 3 key attributes: eating appropriate portion sizes at each meal, avoiding processed foods, and eating the right mix of different foods.

Interestingly, 73% say they are confident they know how to choose healthy foods, 68% find it easy to cook/prepare food that follows a healthy eating pattern and 67% find it is easy to figure out how healthy a product is based on information on the packaging.

Four in 10 believe their own choices about food and beverage purchases can have an impact on the environment.

A large swath of Americans believe their own individual choices about food/beverage purchases can impact the environment: 42% say it can have a significant/moderate impact and 1 in 6 believe the impact can be significant. In addition, half (53%) say that if it was easier to understand the impact their choices have, it would have a greater influence on the choices they make.

This belief in the impact of individual choices is important for motivating action. Of those who say their choices have no real impact on the environment, only 14% consider environmental sustainability a key driver of their purchases. Of those who believe their choices have a moderate impact, 34% put sustainability as a key driver. For those who believe their choices have a significant impact, a full 2 in 3 (67%) say that environmental sustainability is a key purchase driver.

Of those who believe their choices have at least a moderate impact, two categories of products stand out as having the greatest potential negative impact on the environment: 1) meat and poultry and 2) bottled beverages.

The factors that influence purchases have remained largely the same, although the importance of taste is down slightly.

As has been the case in most years, the priority of purchase drivers remains largely stable: taste is #1(82%), followed by price (66%), healthfulness (58%), convenience (52%) and environmental sustainability (31%). While the order maintained, taste is down slightly from 88% last year.

Sixty-eight percent say familiarity is a key driver when it comes to purchasing foods and beverages. Interestingly, while one might expect Americans to gravitate *more* towards the comfort of the familiar in a crisis environment, the importance of this factor hasn't increased compared to before the pandemic. Awareness of the Dietary Guidelines for Americans continues to rise, which many believe gives them the knowledge to eat healthy and make smart food choices.

Last year revealed a dramatic increase in familiarity with the Dietary Guidelines for Americans over the past decade, with the percent knowing at least a fair amount going from 23% in 2010 to 41% in 2020. Perhaps boosted by the late-2020 release of the 2020-2025 edition of the Guidelines, the number continues to rise, with 46% now saying the same in 2021.

Those who know about the Guidelines also credit this knowledge with important outcomes: 59% say they help them have a general awareness of how to eat healthy, 57% say they help them make smarter food choices and 55% say they help them understand how much of each food group to aim for. Fifty-seven percent of parents of children under 18 also say they help them make smarter choices for their family/kids.



Consumers care more about whether their food has ingredients with chemicalsounding names than they care about long ingredient lists.

Four in 10 Americans say it is important to them that a food/beverage include only a few ingredients (43%). Yet, the type of ingredients are much more impactful: 54% say it is important the ingredients not have "chemical-sounding names" and half care about only having ingredients they consider healthy or ingredients they recognize.

We also tested these ideas together. Consumers evaluated two hypothetical products that had the same Nutrition Facts label: Product A has a long list of ingredients, but none of the ingredients have a chemical-sounding name. Product B has a short list of ingredients, but several of the ingredients have a chemical-sounding name.

Overall, 48% of consumers said Product A was likely to be the healthier of the two, vs. just 9% choosing Product B. For those concerned about chemical-sounding names, the majority (53%) say the concern relates to both healthfulness and safety. Younger consumers are much more likely to snack at almost every time of the day; more than 1 in 3 snack in the late-night hours after 11 p.m.

When it comes to snacking, Americans' favorite times of day to partake are late afternoon (3 p.m.-5 p.m.) and late evening (8 p.m.-11 p.m.). In both of these windows, nearly half reach for a snack.

Snacking habits vary greatly by age, though. Younger people are more likely to snack throughout the day. In comparison to those age 65+, consumers under 35 are more than twice as likely to snack in the late morning/early afternoon, six times more likely in the early morning, and ten times more likely late at night. In fact, 37% of these younger consumers snack after 11 p.m.



Four in 10 Americans followed a diet in the past year, but fewer did so for appearance's sake.

As in previous years, about 4 in 10 say they followed a diet or specific eating pattern (39% in 2021, 43% in 2020, 38% in 2019). Interestingly, *calorie counting*, a new addition this year, has taken the lead as most common, edging out *clean eating* and *intermittent fasting*, which have jockeyed for the top spot for several years.

Also notable: wanting to lose weight remains the top reason to try a diet, but fewer now say this is the case: from 47% in 2020 to 38% in 2021. Similarly, those who say the reason is to improve their physical appearance fell from 39% to 29%.

After wanting to lose weight (38%), the next most common reasons for following a diet in 2021 are protecting long-term health/preventing future health conditions (37%) and wanting to feel better and have more energy (37%).

Nearly 7 in 10 who seek health benefits from food say it is easy to find the foods or nutrients that deliver those benefits.

Overall, 20% of Americans actively seek out foods or follow a diet for specific health benefits and 60% just try to eat healthy in general. Weight loss/management, energy/less fatigue, digestive health and heart health are the most common benefits sought. Interestingly, 68% of those seeking a health benefit from food say it is easy to find foods or nutrients that provide that benefit.

When it comes to the Carbohydrates section of the Nutrition Facts label, *Total Sugars* has a much bigger impact on purchase decisions vs. *Added Sugars*.

Twenty-five percent of consumers say that the Total Sugars information on the Carbohydrates portion of Nutrition Facts labels has the biggest influence on their purchases. Twenty-one percent say the same about Total Carbohydrates information and only 13% say this about Added Sugars. Overall, the number of Americans limiting or avoiding sugars in their diet has remained stable (72%) since 2020 but remains down vs. 2019 (80%).



Six in 10 Americans say that the fair and equitable treatment of workers is important to them.

Fifty-nine percent of Americans say it is important to them that the foods they purchase or consume are produced in ways that are committed to the fair and equitable treatment of workers, an aspect of social sustainability. More than a quarter say it is very important (27%).

In particular, parents with children under 18 (69% vs. 56%), African Americans (68% vs. 56%), those who made an effort to help their community in 2020 (67% vs. 35%) and those with higher education (63% vs. 57%) are all more likely to say this is important vs. their respective counterparts.

Those who care about this issue are mixed in whether it is easy or difficult to find information on it: 44% report that it is easy to find while 48% say it is difficult.

Although concern over foodborne illness and chemicals in foods are down vs. their pre-pandemic position in 2019, they remain the top two safety concerns for Americans.

More than 50% of Americans consider foodborne illness from food a top food safety concern, including 26% who say it is issue number one. Nearly 50% consider chemicals found in food and carcinogens in food a top issue (although chemicals edges out carcinogens in terms of #1 issue).

In addition, 4 in 10 express concern about exposure to the novel coronavirus when shopping in grocery stores or from those preparing food in restaurants. Concern about exposure from farmers/food manufacturers is lower, but 28% still express concern.

Even with these overarching concerns, 68% remain confident in the in the safety of the U.S. food supply in general – a figure that has remained constant for the last several years, even amidst the pandemic.

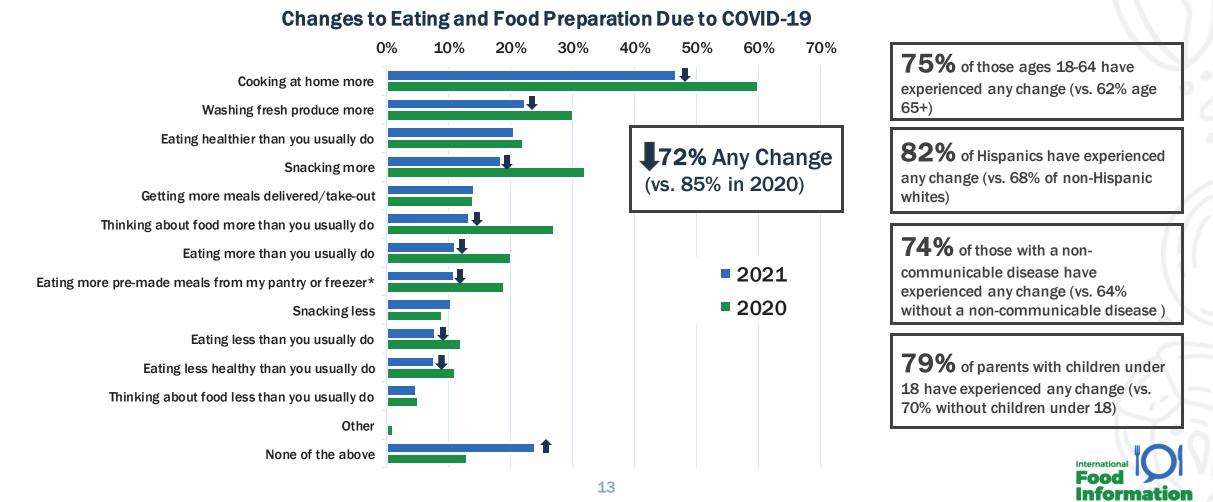




Ongoing Impact of COVID-19

Pandemic-related changes to eating and food prep are decreasing

Parents, people with non-communicable diseases, Hispanics and younger consumers are more likely to have experienced a change as a result of the pandemic

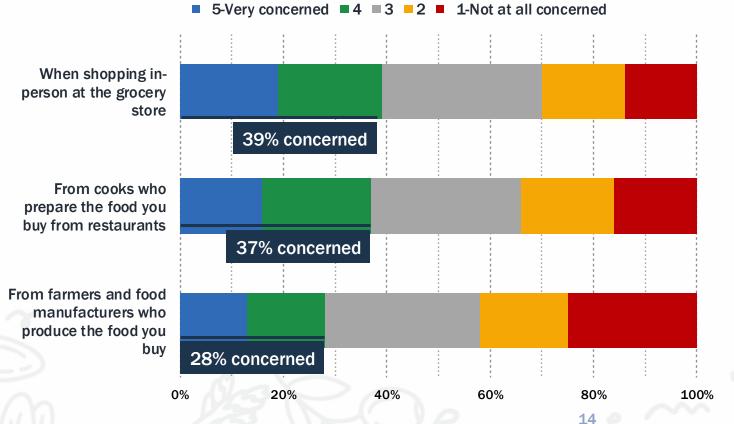


(REVISED TREND) Q18. Has there been any change to food you eat or how you prepare food as a result of the coronavirus (COVID-19) pandemic? Select all that apply. (n=1,014) *Slight wording change in 2021

Four in 10 remain concerned about COVID-19 exposure in stores/restaurants

There is less concern about exposure from farmers/food manufacturers, but 28% still express concern

Concern About COVID-19 Exposure Related To...



African Americans are more likely than non-Hispanic whites to be concerned about being exposed to COVID-19 in all three scenarios

Parents with children under 18 are more likely than those without children under 18 to be concerned about being exposed to COVID-19 in all three scenarios

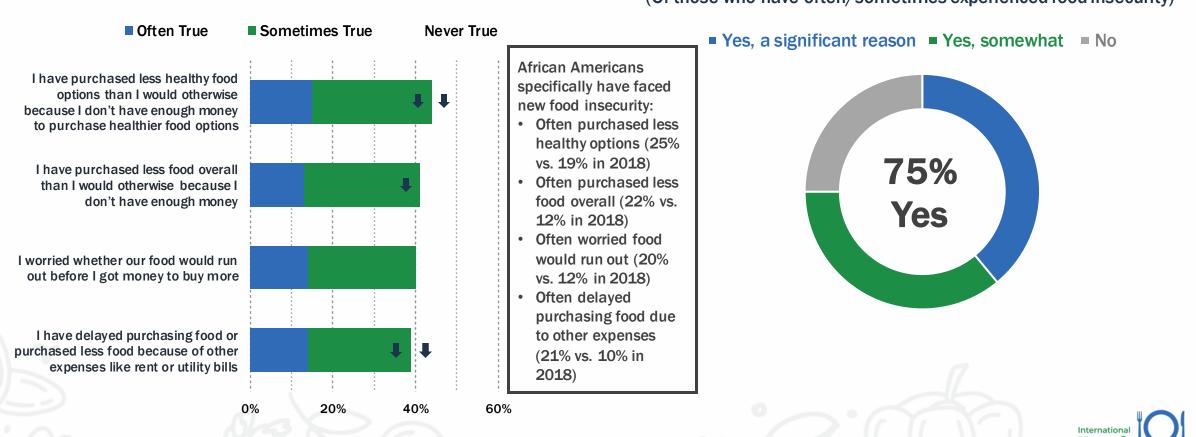
38% of people ages 18-34 indicate that they are concerned about being exposed to COVID-19 from farmers and food manufacturers (vs. 24% age 35+)



Q62. How concerned are you about the risk of being exposed to COVID-19...? (n=1,014)

Three in 4 Americans who experienced food insecurity attributed it to the effects of COVID-19

African American consumers, those ages 18-34, and those with an income <\$75k are more likely than their counterparts to say any of the below statements are often or sometimes true



Level of Food Insecurity

Was COVID-19 the Cause of Food Insecurity? (Of those who have often/sometimes experienced food insecurity)

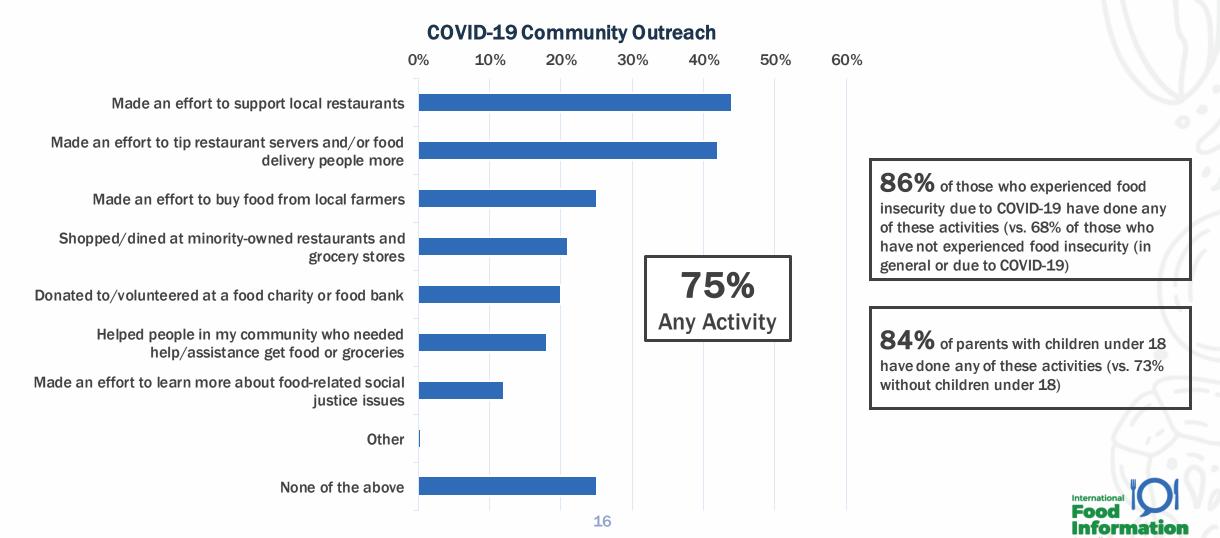
(TREND 2018) Q20. In the past 12 months...? (n=1,014)

Q21. You mentioned that the following are at least sometimes true for you: [INSERT SELECTIONS FROM Q20]. Was the COVID-19 pandemic a reason why you experienced some of these issues? (Often/Sometimes true in Q20, n=513)

15

Three-quarters have made an effort to help their community in the past year

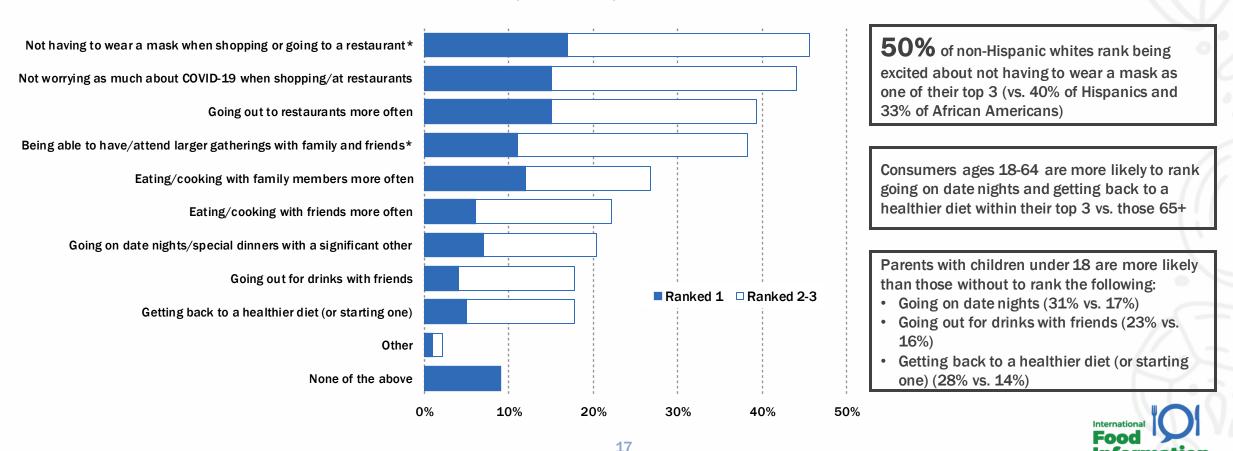
The most common actions: supporting local restaurants and tipping restaurants servers and/or delivery people more



Q17. Over the past year, which of the following, if any, have you done? Select all that apply. (n=1,014)

Americans are excited for a number of food-related activities when the pandemic subsides

Younger consumers and parents are more likely to be excited about going on date nights and getting back to a healthier diet (or starting one)



Most Sought-After Activities After Pandemic Subsides (Ranked 1-3)

*Response text abridged

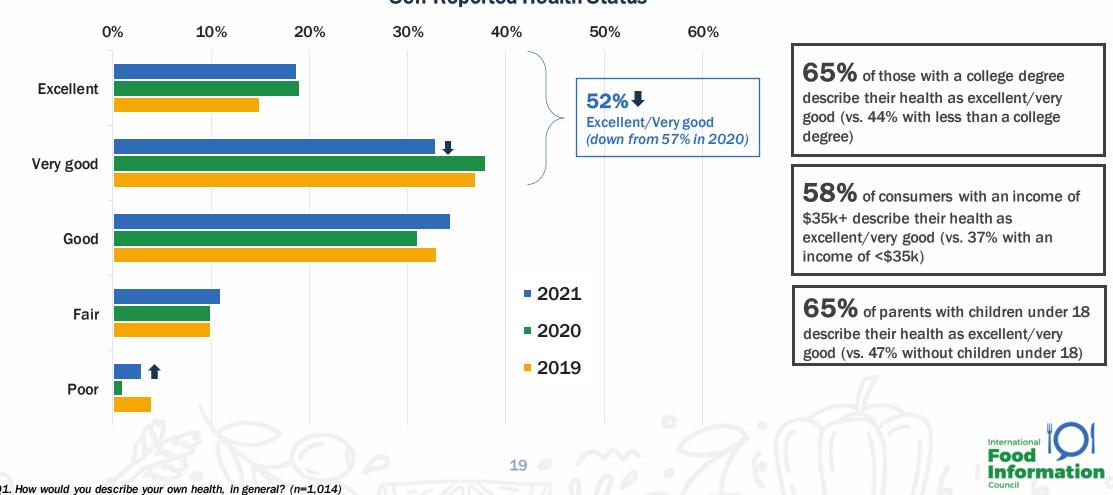
Q19. When the pandemic subsides and life returns to normal, what are you most excited about when it comes to food? Please rank your top 3, with 1=Most excited about. (n=1,014)



Perceptions About Health and Nutrition

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

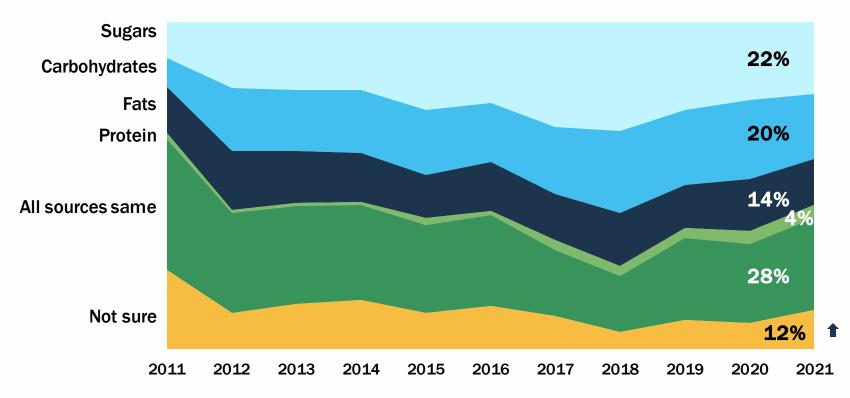
As in previous years, the health disparity by income is immense: only 37% of those with income of less than \$35K view their health as excellent/very good



Self-Reported Health Status

Beliefs about the most likely sources of weight gain are generally unchanged

Nearly 3 in 10 believe that all sources of calories are equally likely to cause weight gain



Source of Calories Most Likely to Cause Weight Gain

24% of people with a non-communicable disease believe calories from sugars are most likely to cause weight gain (vs. 14% without a non-communicable disease)

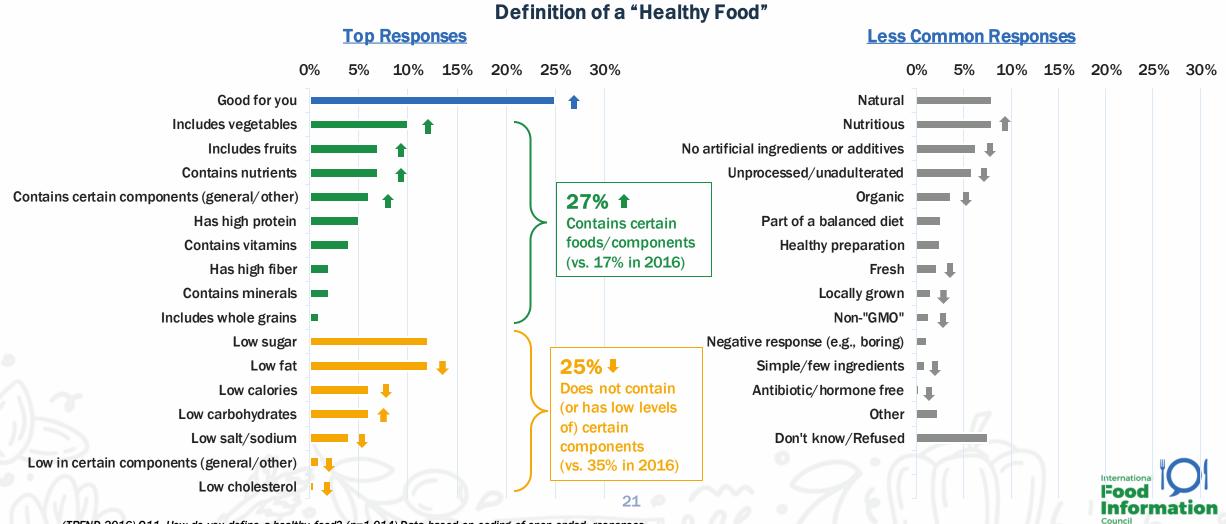
21% of parents with children under the age of 18 believe calories from fats are most likely to cause weight gain (vs. 12% of without children under the age of 18)

31% of consumers who find it easy to figure out which foods are healthy believe calories from all sources have the same impact on weight gain (vs. 24% who find it difficult)



Americans' definition of "healthy food" took a more positive tone in 2021

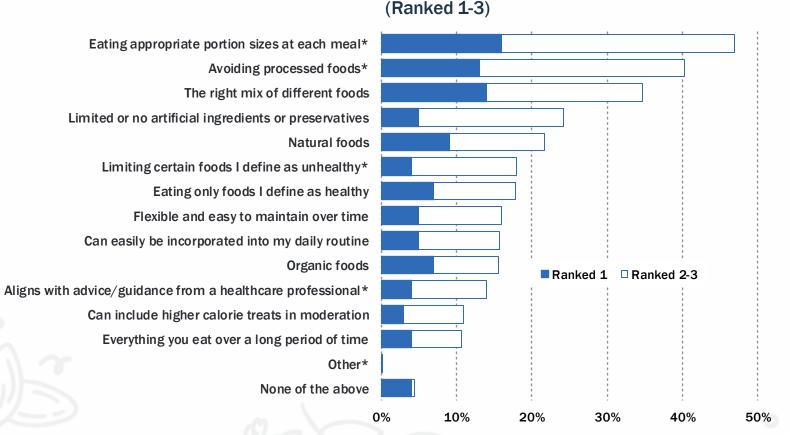
27% define it as containing certain healthy components, up from 17% in 2016



(TREND 2016) Q11. How do you define a healthy food? (n=1,014) Data based on coding of open-ended responses.

Consumers deem appropriate portion sizes the most common element of a "healthy eating pattern"

Eating the right mix of different foods is still a top response, similar to 2016



Definition of a Healthy Eating Pattern (Ranked 1-3)

Top 5 Responses: 2016 vs. 2021 (Based on Top Ranked Response)

	2016	2021
#1	The right mix of different foods	Eating appropriate portion sizes at each meal <i>(NEW)</i>
#2	Natural foods	The right mix of different foods
#3	Limited or no artificial ingredients or preservatives	Avoiding processed foods (NEW)
#4	Can easily be incorporated into my daily routine	Natural foods
#5	Eating only foods I define as healthy	Eating only foods I define as healthy



(REVISED TREND) Q12. How do you define a healthy eating pattern? (Please rank the top 3 attributes that best fit your definition, with 1=Top Choice.) (n=1,014) *New additions in 2021. Note: due to inclusion of new options, trend comparison arrows are not shown.

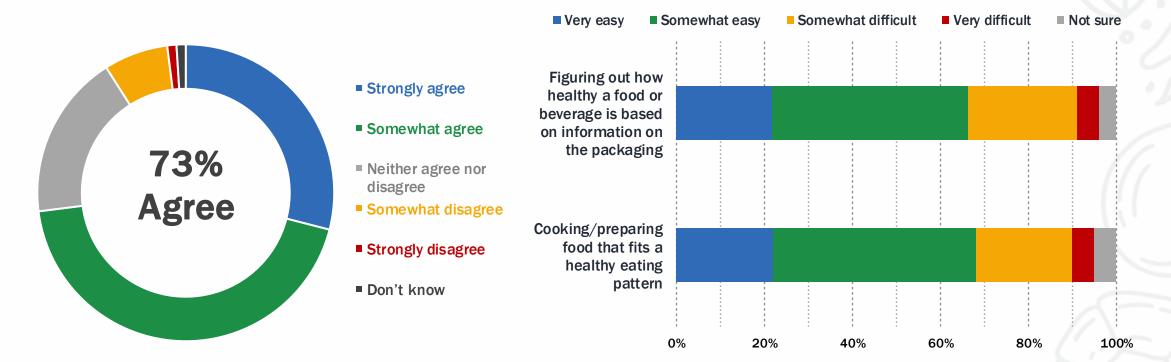
22

Almost three-quarters are confident in their ability to choose healthy foods

Around 2 in 3 Americans also find it easy to figure out how healthy a product is based on the information on the packaging and to cook/prepare food that fits a healthy eating pattern

Agreement With Confidence in Choosing Healthy Foods

Ease of Doing the Following Related to Healthy Foods





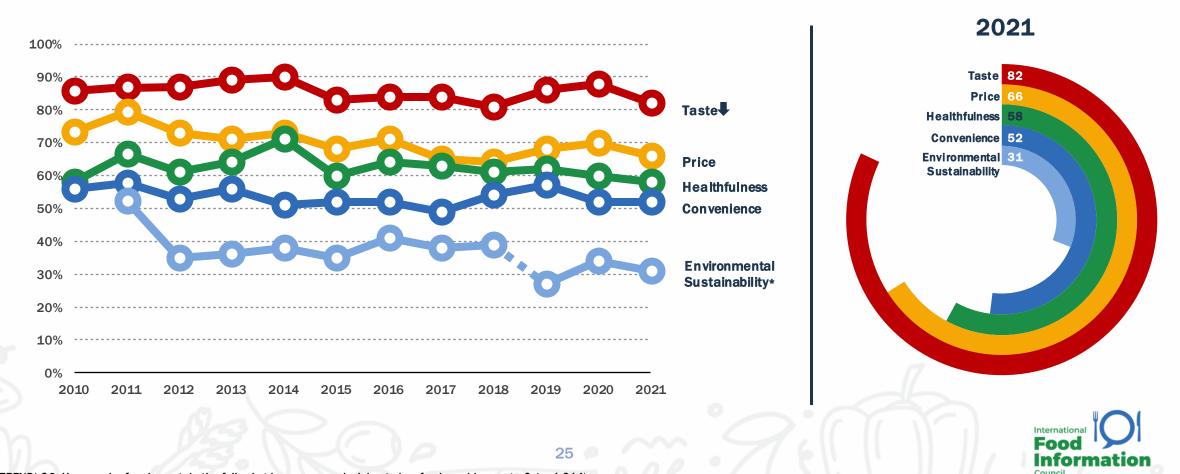


Purchase Drivers and Shopping Patterns

While taste is still the top driver of food and beverage purchases, its importance slipped slightly in 2021

Otherwise, the drivers of purchase decisions have remained largely stable since 2020

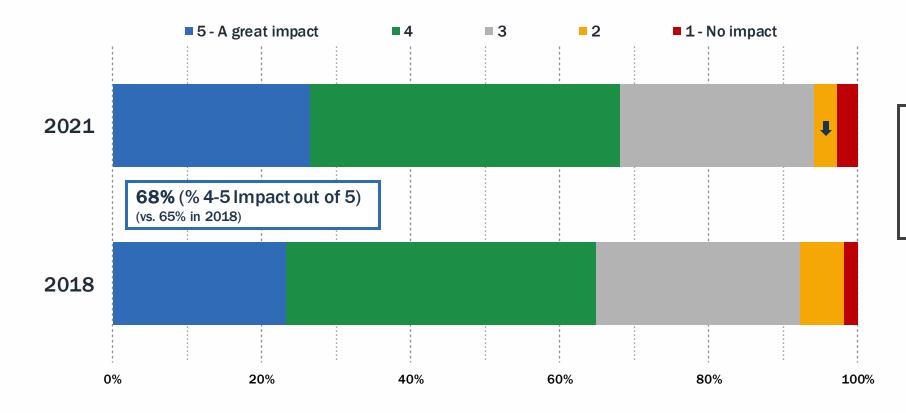
Purchase Drivers Over Time (% 4-5 Impact out of 5)



(TREND) Q6. How much of an impact do the following have on your decision to buy foods and beverages? (n=1,014) *Prior to 2019, Environmental Sustainability was asked simply as "Sustainability"

Nearly 7 in 10 consider familiarity important when purchasing a product

Familiarity tends to be more impactful for those with a higher income and those who are married or partnered



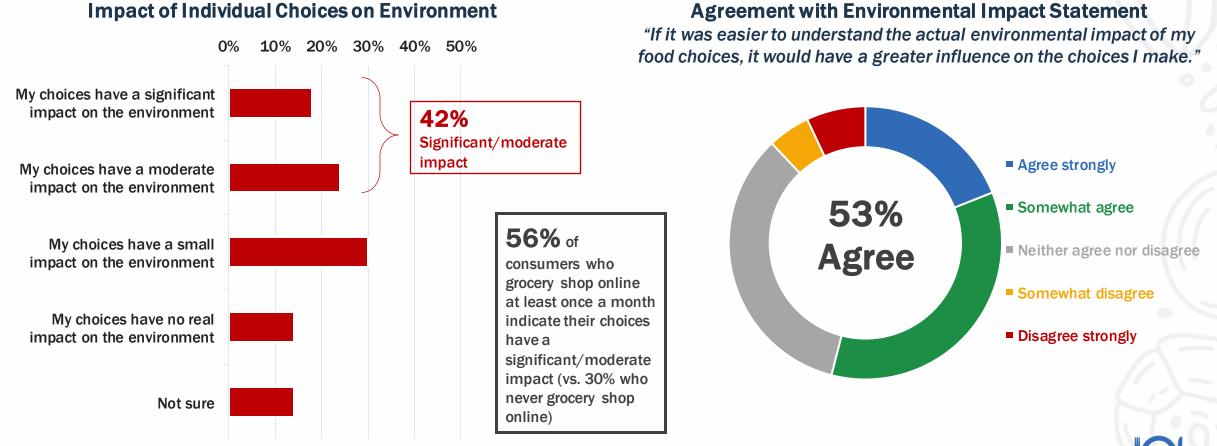
Impact of Familiarity on Purchases

76% of consumers with an income of \$75k+ say familiarity has an impact (vs. 55% with an income of <\$35k)



Over 4 in 10 believe their individual food and beverage choices impact the environment

Half of Americans also agree that if it were easier to understand the actual impact of their choices, it would have a greater influence

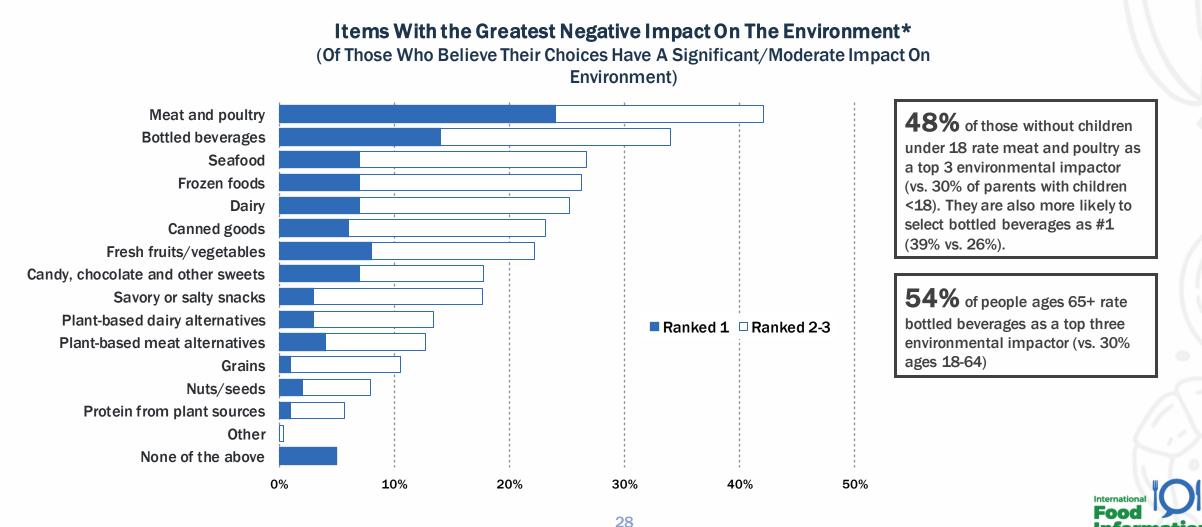




Q8. To what degree do you believe your individual choices about food and beverage purchases impact the environment? (n=1,014) Q9. Do you agree or disagree with the following statement? (n=1,014)

Meat/poultry is seen as having the greatest negative impact on the environment

Bottled beverages rank second, followed by seafood, frozen foods and dairy



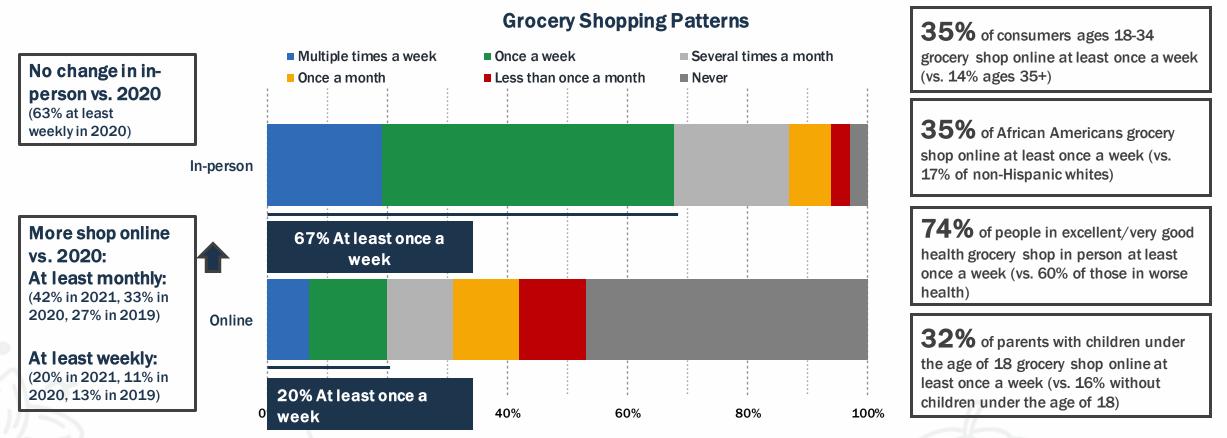
*Response text is abridged (examples were shown for several of the options)

Q10. You indicated that your individual food choices can impact the environment. Of the food/beverage types below, which do you view as having the greatest negative impact on the environment? (Please rank the top 3, with 1=Biggest impact.) (Those who believe their choices have a moderate/significant effect, n=431)

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Compared with spring 2020, many more are grocery shopping online

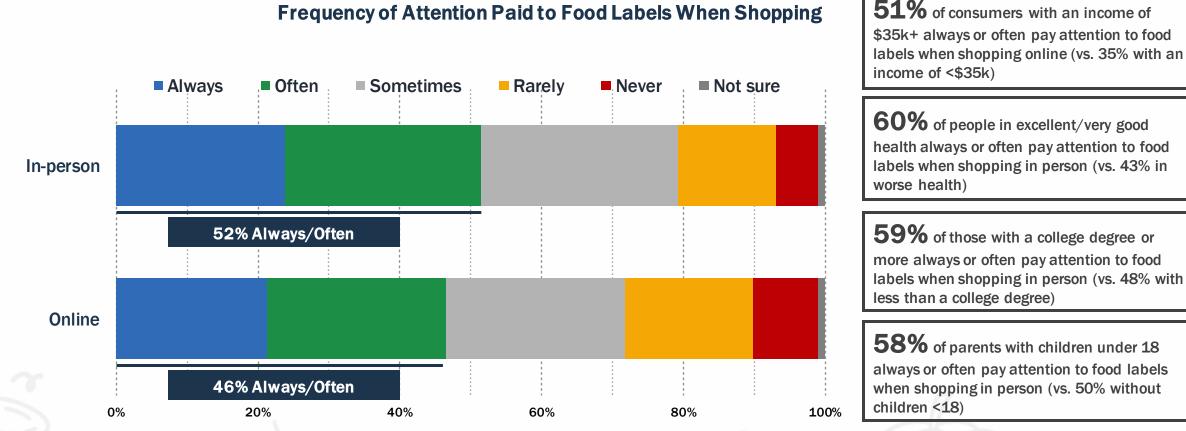
Younger consumers, African Americans and parents tend to grocery shop online more frequently than their counterparts





About half pay close attention to food labels when shopping (online or in-person)

People in excellent/very good health are far more likely to pay attention to food labels in-person than those in worse health





Q16. How often do you pay attention to the labels on food and beverage packaging when shopping...? (Those who ever shop online, n=517, Those who ever shop in person, n=984)

Consumers perceive health differences even when two products have the same Nutrition Facts label

Not having chemical sounding ingredients, being "all natural," and being "plant-based" products garner healthier images

Highly likely that Product A healthier Somewhat likely that Product A healthier Highly likely that Product B healthier Somewhat likely that Product B healthier 20% 0% 20% 40% 40% 60%

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If Two Products Have the Same Nutrition Facts Panel, Which Is Healthier?

31

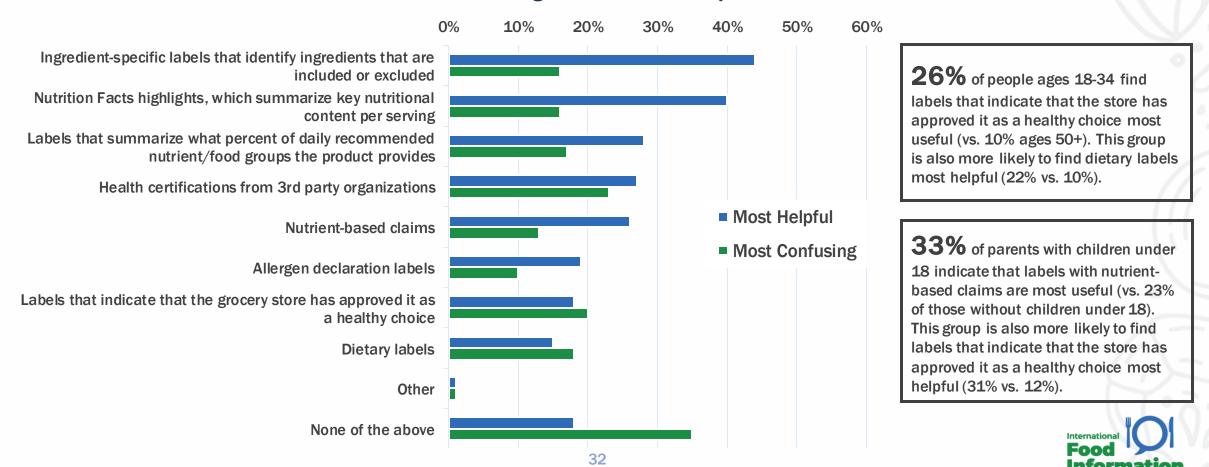
Product A is described as a "bioengineered food/containing bioengineered ingredients" on the label and Product B is not Product A has a longer list of ingredients than Product B Product A is described as a "plant-based food" on the label and Product B is not Product A is described as "having a small carbon footprint" on the label and Product B is not* Product A is described as having "clean ingredients" on the label and Product B is not* Product A has a long list of ingredients, non with a chemical-sounding name. Product B has a short list of ingredients, several with a chemical-sounding name* Product A is a fresh product and Product B is frozen Product A is described as "all natural" on the label and Product B is not Product A is produced in a more environmentally sustainable way than Product B 60%

Product A contains artificial ingredients and Product B does not

(TREND) Q22. Would any of the following details lead you to believe that one of the products was more likely to be healthier? (n=1,014) *New additions in 2021

Ingredient-specific labels and Nutrition Facts highlights are seen as most helpful

Health certifications and labels that indicate that the grocery store has approved it as a healthy choice are most confusing



Front Package Food Label Perceptions

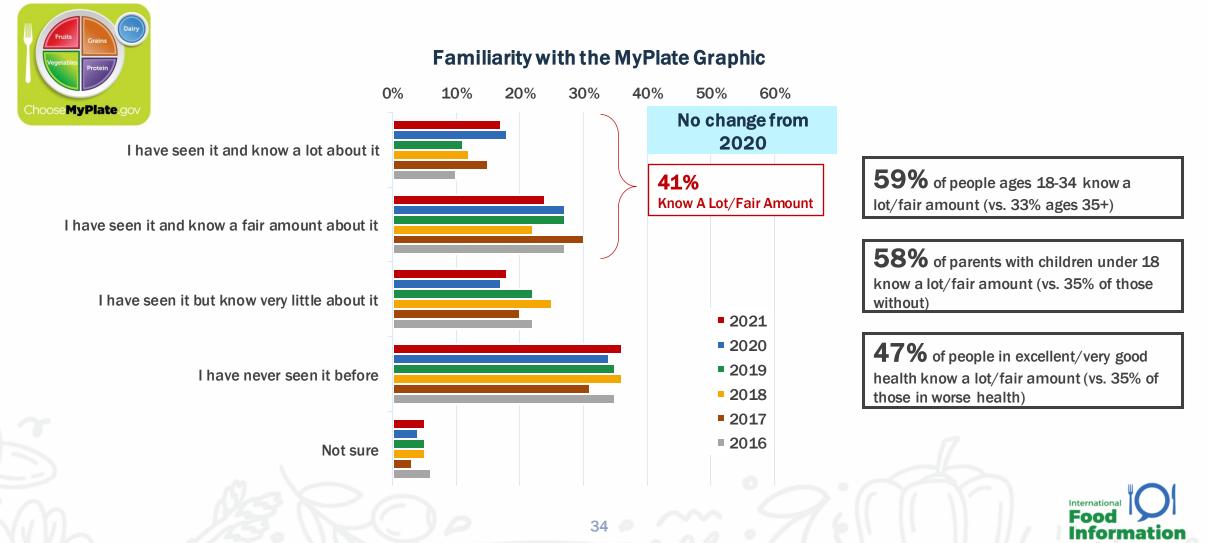
Q23. Which of the following labels found on the front packaging of food and beverage products do you find most useful to you? Select all that apply. (n=1,014) Q24. Which of the following labels found on the front packaging of food and beverage products do you find most confusing to you? Select all that apply. (n=1,014)



Familiarity with Dietary Guidelines

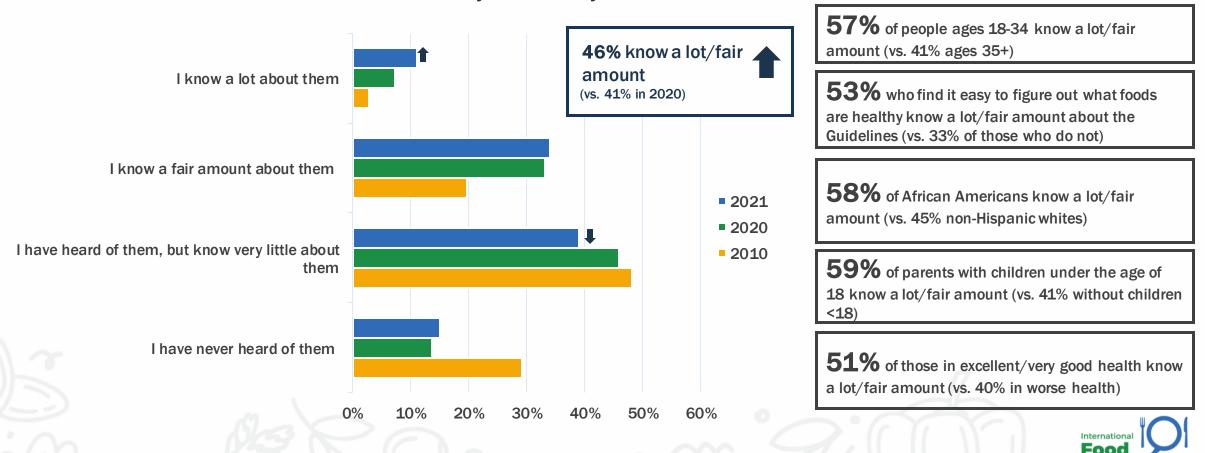
Familiarity with the MyPlate graphic is steady with 2020

Younger consumers, higher-income consumers, parents and those in good health are more likely to know about the graphic



Familiarity with and knowledge about the Dietary Guidelines for Americans is up from 2020

This survey was fielded in March 2021, nearly three months after the newest edition of the Guidelines was released



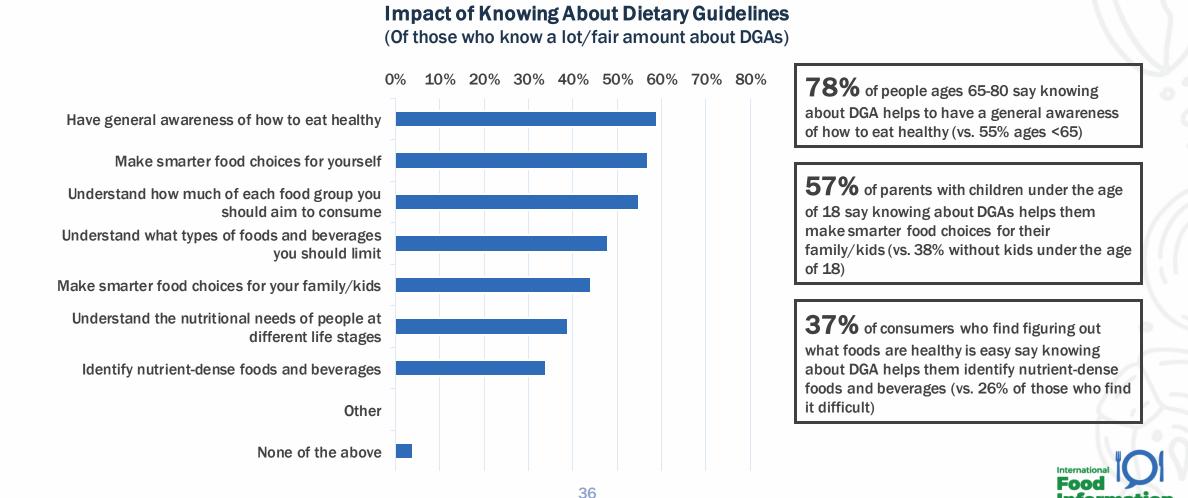
35

Familiarity with Dietary Guidelines for Americans

(TREND) Q3. 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=1,014)

Those who know about the Guidelines say it helps them know how to eat healthy

Nearly 6 in 10 parents who know a fair amount about the Guidelines say it helps them make smarter choices for their family/kids



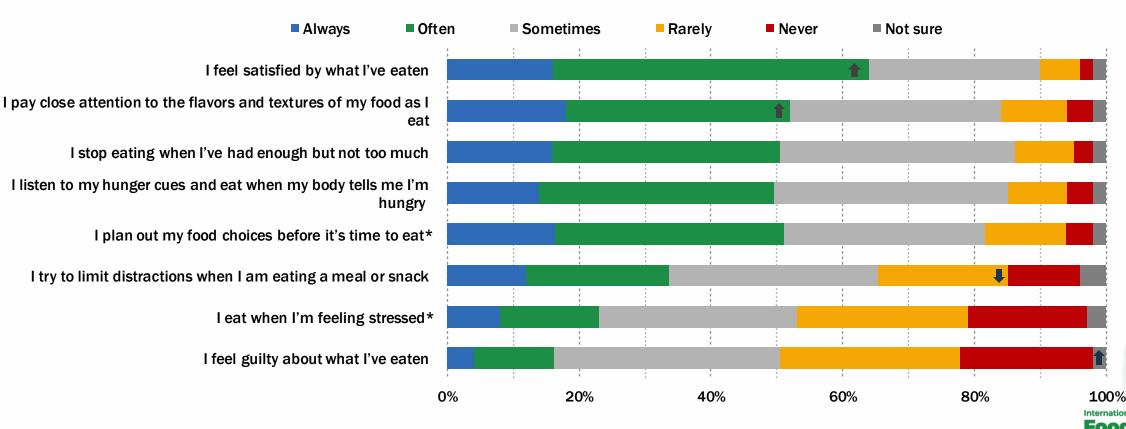
Q4. Which of the following, if any, does knowing about the Dietary Guidelines for Americans help you do? Select all that apply. (Of those who know a lot/fair amount about DGAs, n=452)



Diets and Eating Patterns

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

Parents are more likely to try to limit distractions when eating a meal or snack, eat when feeling stressed and feel guilty about what they've eaten



Eating Patterns Related to Mindful/Intuitive Eating

(TREND) Q25. How often do you do the following? (n=1,014) *New additions in 2021

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There has been no change in the number following a diet/eating pattern in the last year

Younger consumers, those with a college degree or more, women and parents are more likely to have tried a diet

Followed A Diet in Past Year? 0% 5% 10% 15% 20% ■ Yes ■ No **52%** of people ages 18-34 Calorie counting* Clean eating have tried a diet in the past year Intermittent fasting (vs. 33% ages 35+) Low-carb diet Ketogenic or high-fat diet 43% of women have tried a Flexitarian 39% Plant-based diet diet in the past year (vs. 34% of Carb-cycling men) Mediterranean diet Yes Gluten-free diet Whole 30 50% of Hispanics have tried a Weight-loss plan diet in the past year (vs. 34% of Paleo diet non-Hispanic whites) Personalized diet based on DNA test results Vegetarian diet DASH diet Cleanse No change **53%** of parents with children Vegan diet 💻 from 2020 under 18 have tried a diet in the Other – past year (vs. 34% without children under 18) 39

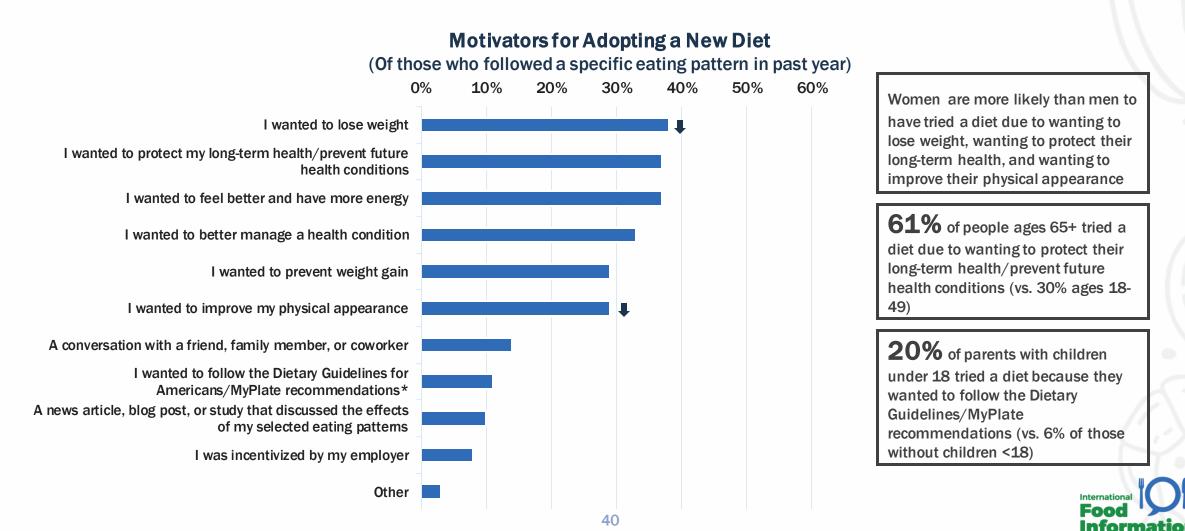
Type of Diet Followed

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(REVISED TREND) Q28. Have you followed any specific eating pattern or diet at any time in the past year? Select all that apply. (n=1,014) *New addition in 2021

Fewer Americans dieted in 2020 in order to lose weight, although it still ranks #1

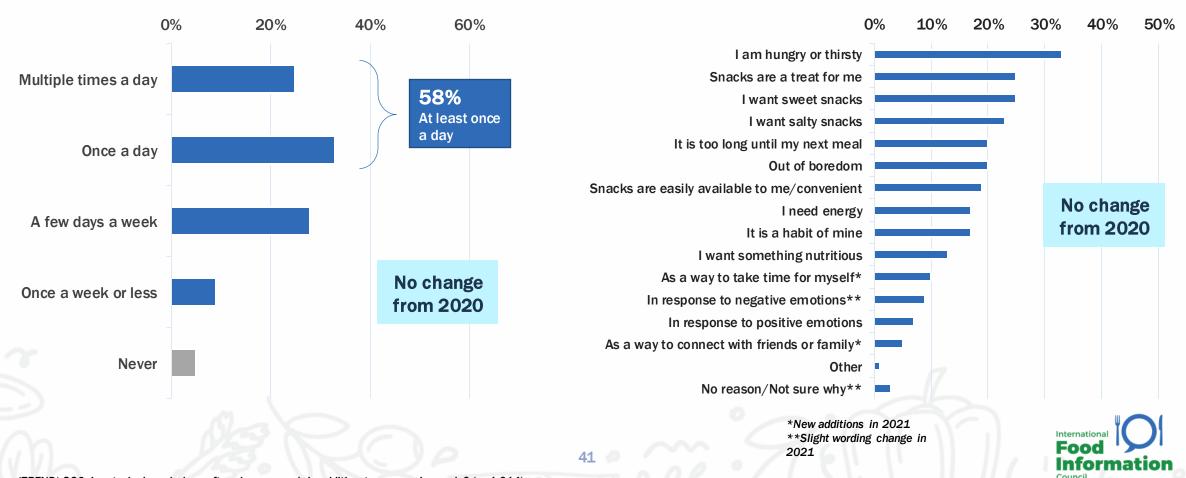
Women and older consumers are more likely to have started a diet in order to protect their long-term health



(REVISED TREND) Q29. 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, n=390) *New addition in 2021

Frequency of snacking is steady with 2020

There has been little change in reasons for snacking—the top reason remains being hungry or thirsty



Frequency of Snacking

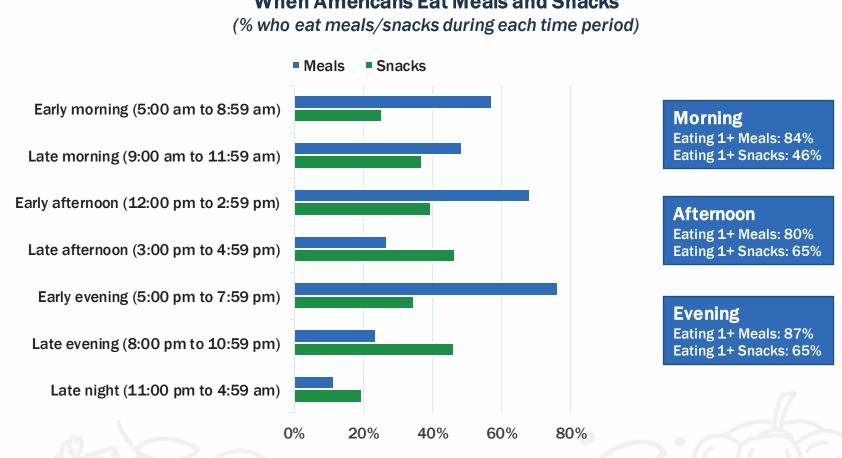
Reasons for Snacking

(TREND) Q26. In a typical week, how often do you snack in addition to your main meals? (n=1,014)

(REVISED TREND) Q27. 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=968)

Snacking is most common in the late afternoon and late evening

Nearly half of Americans say they snack between 3pm and 5pm and between 8pm and 11pm; about 4 in 10 snack in the late morning and early afternoon



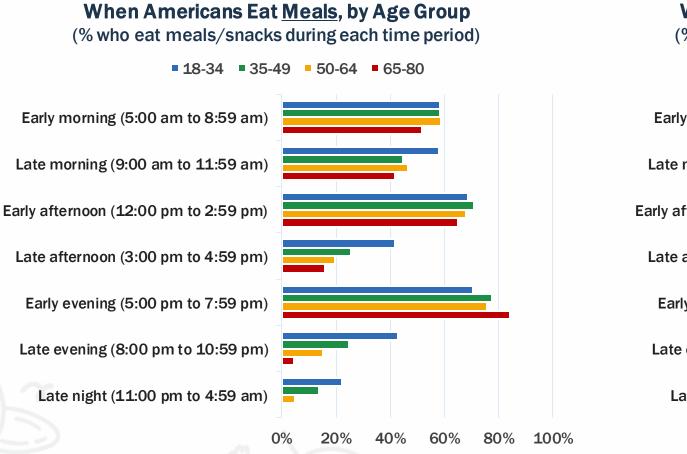
42

Info Counci

When Americans Eat Meals and Snacks

Younger Americans are more likely to snack throughout the day

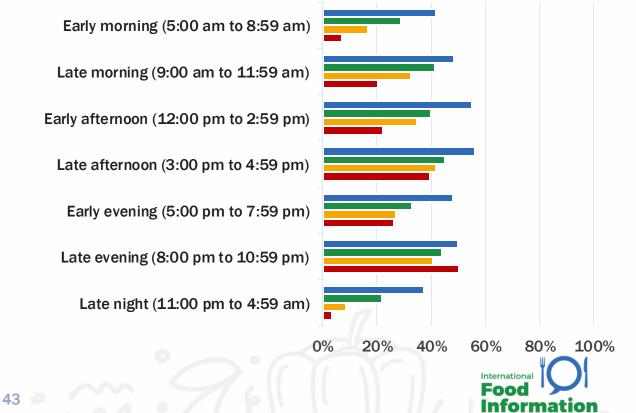
More than a third of consumers age 18-34 say they snack late at night



When Americans Eat <u>Snacks</u>, by Age Group

(% who eat meals/snacks during each time period)

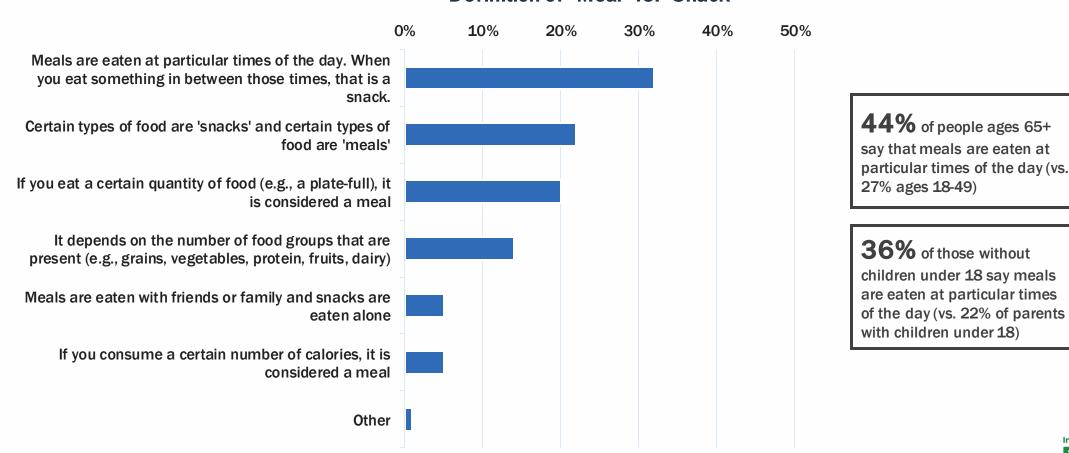
■ 18-34 ■ 35-49 **■** 50-64 **■** 65-80



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Snacks are most often defined by when they are eaten

Older Americans are much more likely to define snacks by time of day; those age 18-34 consider the type of food to be the number one distinction



Definition of "Meal" vs. "Snack"

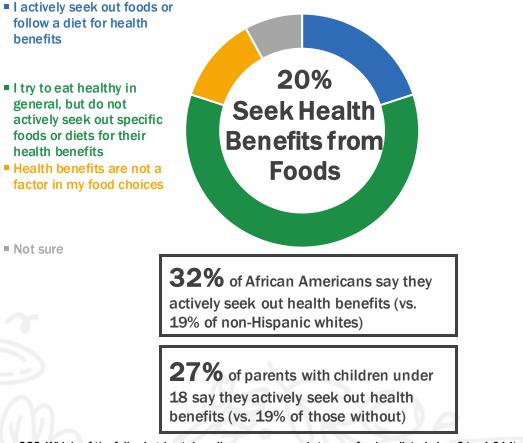


Nutrients and Desired Health Benefits

One in 5 actively seek health benefits from foods

Weight loss/management, energy, and digestive health are the most common health benefits sought from food

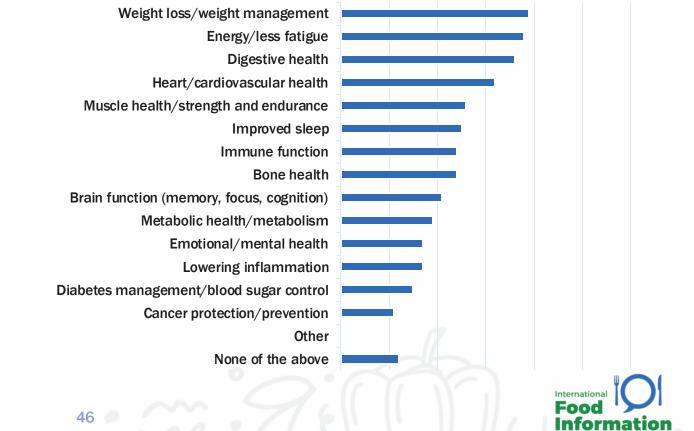
Seeks Health Benefits from Foods?



Health Benefits Sought from Food

0% 10% 20% 30% 40% 50% 60%

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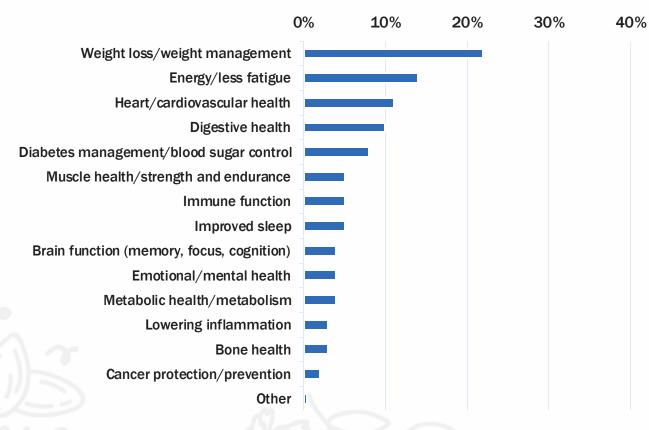
Q32. Which of the following best describes your approach to your food or diet choices? (n=1,014)

Q33. Which of the following health benefits are you seeking to get from foods or nutrients? Select all that apply. (If actively seeks health benefits OR just tries to eat healthy, n=833)

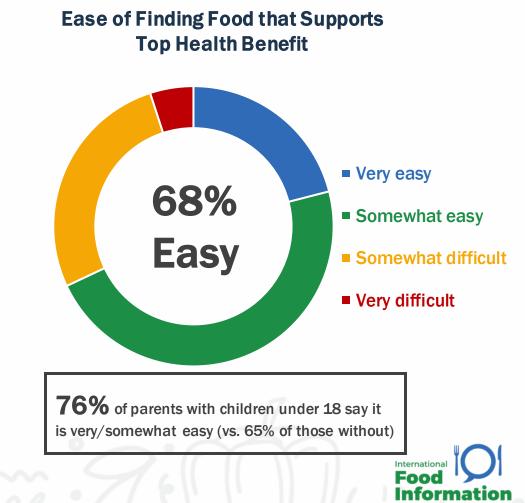
Two in 3 say it is easy to find foods that provide their top health benefit

Although some benefits are more common than others, there are a wide range of benefits selected #1 by Americans; only 4 health benefits are identified as #1 by at least 10%

47



#1 Health Benefit Sought from Food



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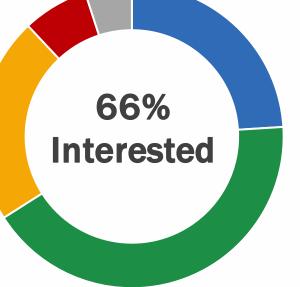
Q34. Which of the following would you rank as the number one health benefit you seek to get from foods or nutrients? Select only one.(If seeks health benefits, n=737) Q35. How easy or difficult is it for you to find foods/nutrients that provide this health benefit? (If seeks health benefits, n=737)

Two-thirds are interested in learning more about the role of food and nutrients in immune health

Parents with children under 18 and those with middle-high income are more interested in the role foods and nutrients play in immune health vs. their counterparts

Interest in Learning About the Role that Foods and Nutrients Play in Immune Health





71% of consumers with an income of \$35k+ say they are very/somewhat interested (vs. 55% of consumers with an income of less than \$35k)

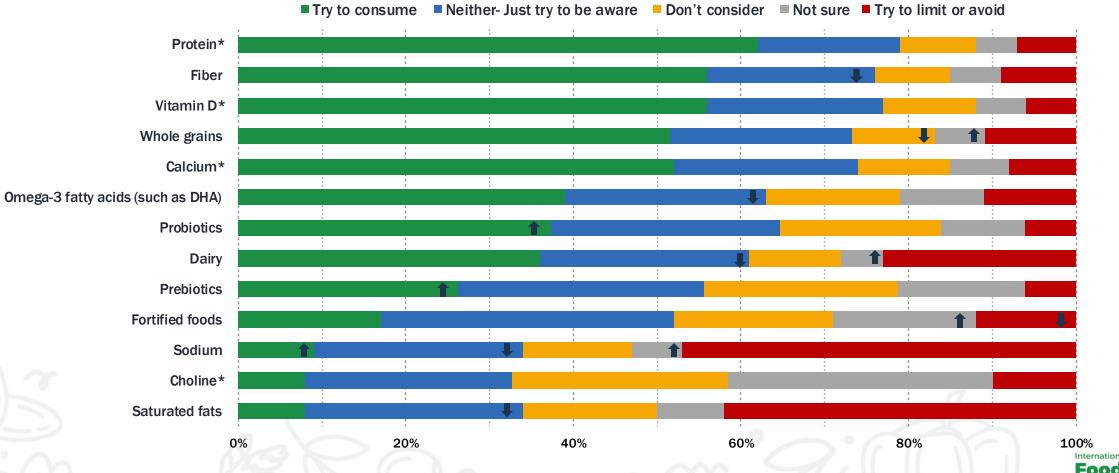
74% of parents with children under 18 say that they are very/somewhat interested (vs. 64% of those without children under 18)

71% of people who grocery shop online at least once a month say that they are very/somewhat interested (vs. 60% of people who never grocery shop online)



More are trying to consume probiotics and prebiotics in 2021

62% try to consume protein, 56% try to consume vitamin D, and 52% try to consume calcium; Choline is relatively unknown



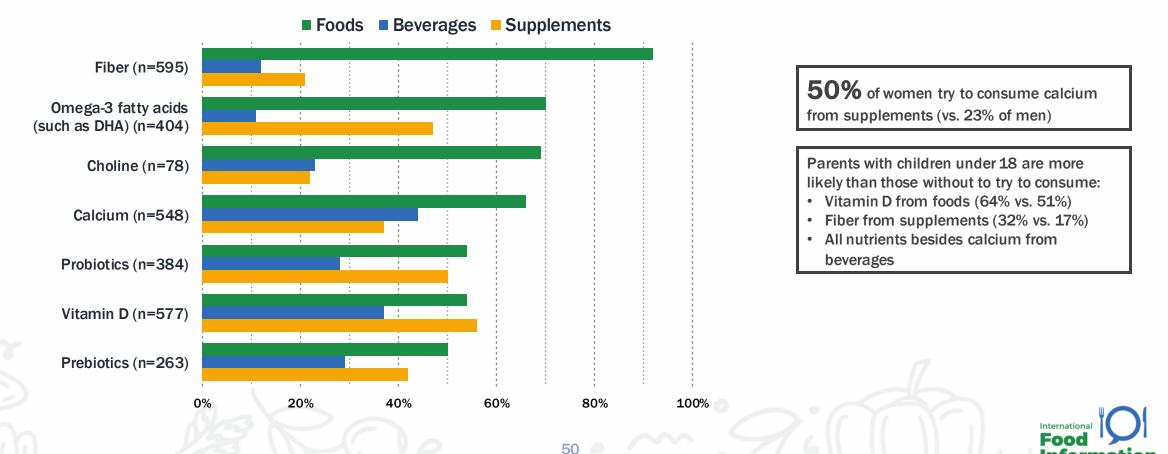
Consume or Avoid the Following

(TREND) Q37. Do you generally try to consume or avoid the following? (n=1,014) *New additions in 2021

Council

With the exception of vitamin D, consumers most often seek many nutrients from foods vs. beverages or supplements

Fiber is most often sought from foods (92% of those seeking fiber), although 1 in 5 still use supplements for fiber; other nutrients, like probiotics, vitamin D, and prebiotics, are consumed from a variety of sources



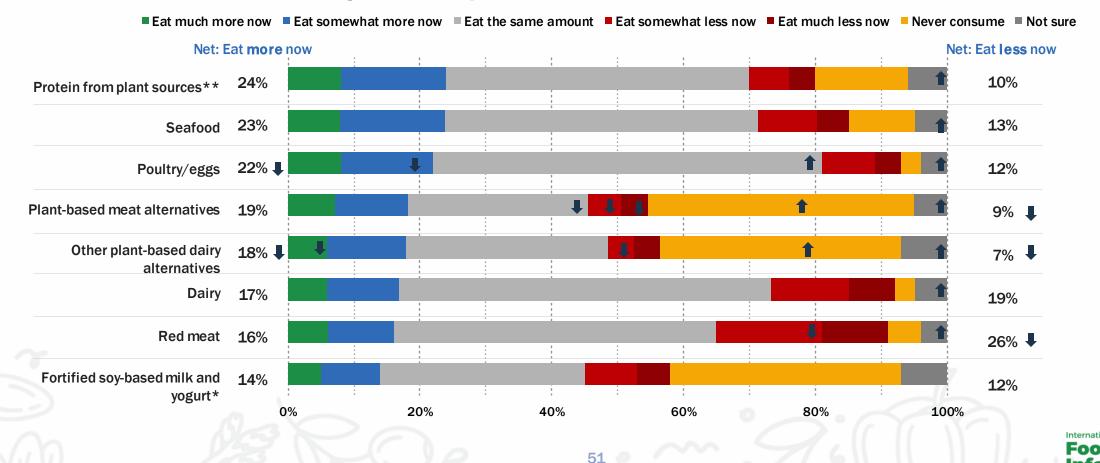
Sources Used to Consume Following Nutrients

Q38. Do you generally try to consume each of the following from food, beverages, supplements, or from more than one of these sources? Select all that apply. (Of those who consume from Q37, n sizes

vary)

One in 4 say they are eating more protein from plant sources vs. a year ago

Consumption of seafood and poultry/eggs is also higher for more than 20% and plant-based meat alternatives is higher for 19%



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Change in Consumption of Protein Sources in the Past 12 Months

(TREND) Q39. Thinking about the last 12 months, how has your consumption of the following changed? (n=1,014) *New additions in 2021, **Slight wording change in 2021



Sugars and Sweeteners

The number limiting or avoiding sugars remains down from 2019

The top 2 reasons for limiting/avoiding sugars remain the same from 2020, although they have slipped slightly in frequency

Actions Taken to Limit/Avoid Sugars Limiting/Avoiding Sugars in Diet (Of those limiting/avoiding sugars) 0% 10% 20% 30% 40% 50% 60% Limit Avoid No Drinking water instead of caloric beverages Limiting certain foods and beverages in my diet Eliminating certain foods and beverages from my diet 72% Reducing the amount of carbs I consume Using the Nutrition Facts label to choose products with less total sugars **Are trying to** limit/avoid No longer adding table sugar to foods and beverages Consuming smaller portions sugars Using the Nutrition Facts label to choose products with less added sugars Choosing foods and beverages labeled as "reduced sugar"* Ordering or purchasing "sugar-free" options when available No change from 2020 Using low-calorie sweeteners instead of adding sugar (but down from 80% in 2019 and 77% in Switching from full-calorie beverages to low and no-calorie options 2018) Other 53

(TREND) Q40. Are you trying to limit or avoid sugars in your diet? (n=1,014) (REVISED TREND) Q41. What action(s) are you taking to limit or avoid sugars? Select all that apply. (Of those limiting/avoiding sugars, n=737), *Slight wording change in 2021

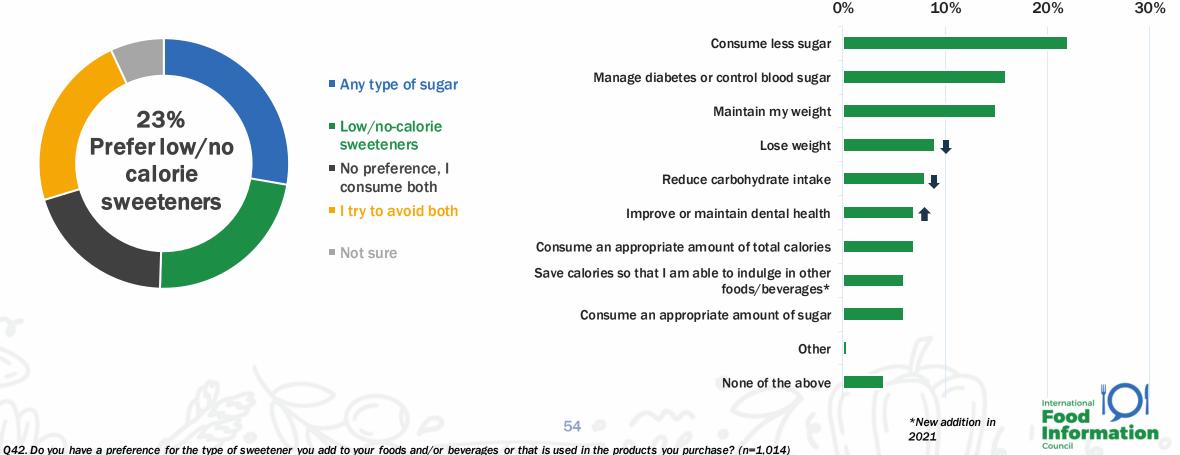
Sugar edges out low/no-calorie sweeteners 28% to 23% in terms of preference

Those preferring low/no-calorie sweeteners are most likely to believe that they help them consume less sugar, manage diabetes and maintain their weight

Preference for Sweetener to Add to Food or Used in Products Purchased

Perceived Benefits of Consuming Low/No Cal Sweeteners

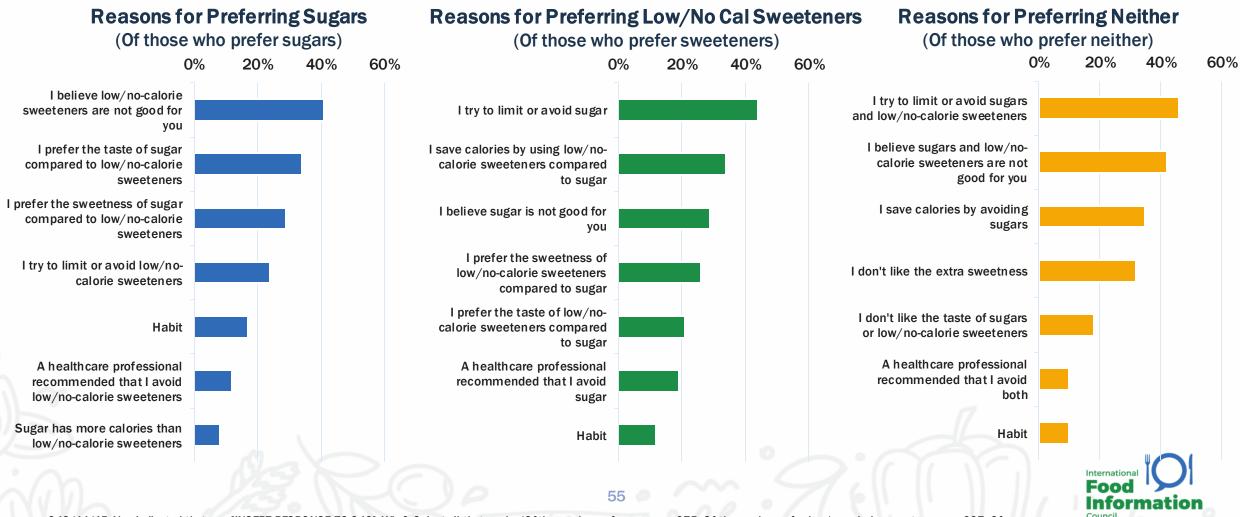
(Of those who prefer low-calorie sweeteners)



(REVISED TREND) Q46. Which of the following, if any, do you believe consuming low/no-calorie sweeteners helps you do? Select top answer. (Of those who prefer low/no calorie sweeteners, n=227)

Few attribute their sweetener preference as a matter of habit

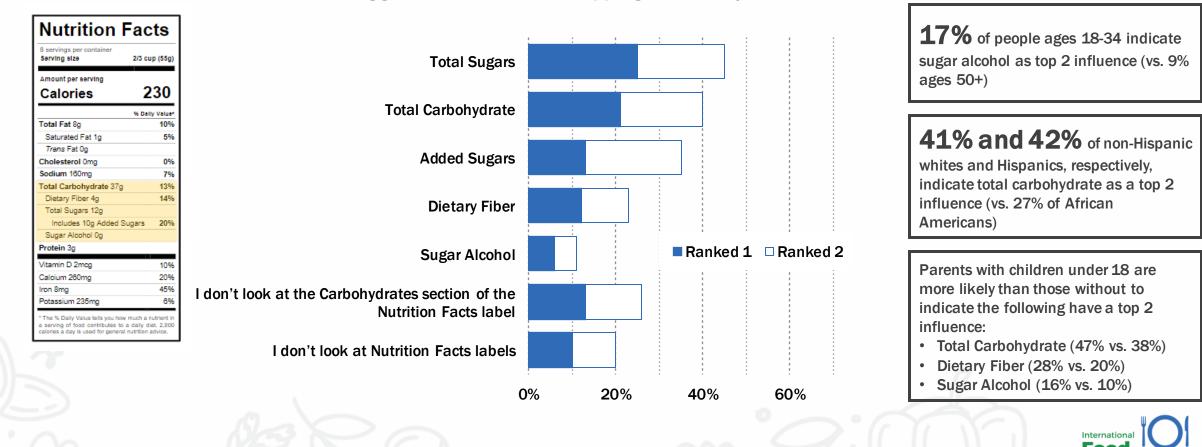
Preference for low/no-calorie sweeteners is often about avoiding sugar or calories from sugar; nearly one in 5 say that a healthcare professional recommendation to avoid sugar is one reason



Q43/44/45. You indicated that you [INSERT RESPONSE TO Q42]. Why? Select all that apply. (Of those who prefer sugar, n=275; Of those who prefer low/no-calorie sweeteners, n=227; Of those who avoid sugar and sweeteners, n=238)

Among options found in the Carbohydrates section of the Nutrition Facts label, Total Sugars and Total Carbohydrate have the biggest influence on purchases

One in 4 consumers say Total Sugars has the biggest influence on their decision vs. just 13% who say the same about Added Sugars



Biggest Influencers on Shopping in Carbohydrates Section

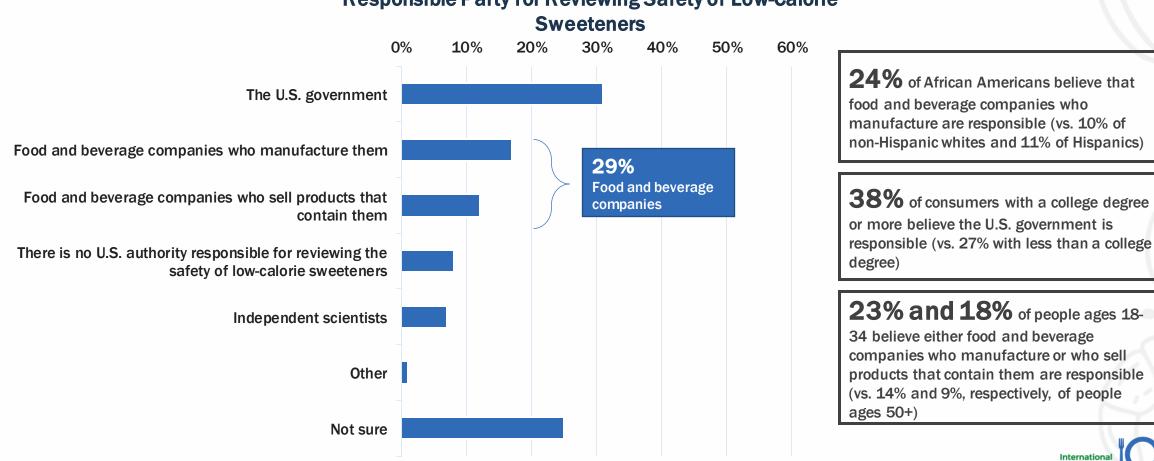
Q47. When shopping for packaged foods and beverages, which information in the Carbohydrates section of the Nutrition Facts label has the biggest influence on your purchases? Please rank your top 2, ^{Cour} with 1=Biggest Influence. (n=1,014)

56

Info

Three in 10 believe companies are responsible for reviewing low-calorie sweetener safety

Although a plurality view the government as the responsible party, a similar share say the same about companies that manufacture or sell low-calorie sweeteners; a quarter are not sure who is responsible



57

Responsible Party for Reviewing Safety of Low-Calorie

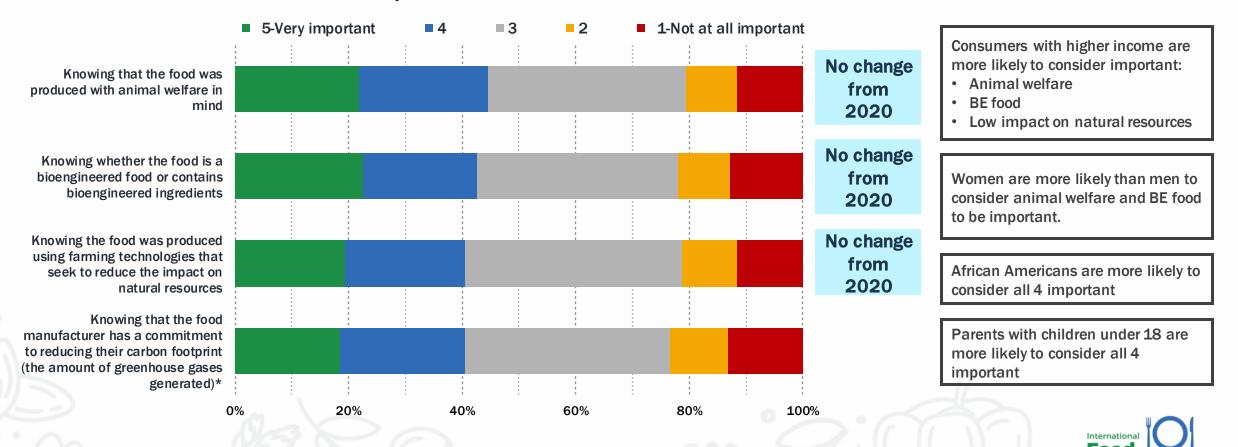
Q48. Who do you believe is currently responsible for reviewing the safety of low-calorie sweeteners (e.g., aspartame, sucralose, stevia leaf extract) in the U.S.? (n=1,014)



Food Production

The importance of certain food production factors on food purchases has remained stable

Knowing that a food manufacturer has a commitment to reducing their carbon footprint is important to 4 in 10 consumers



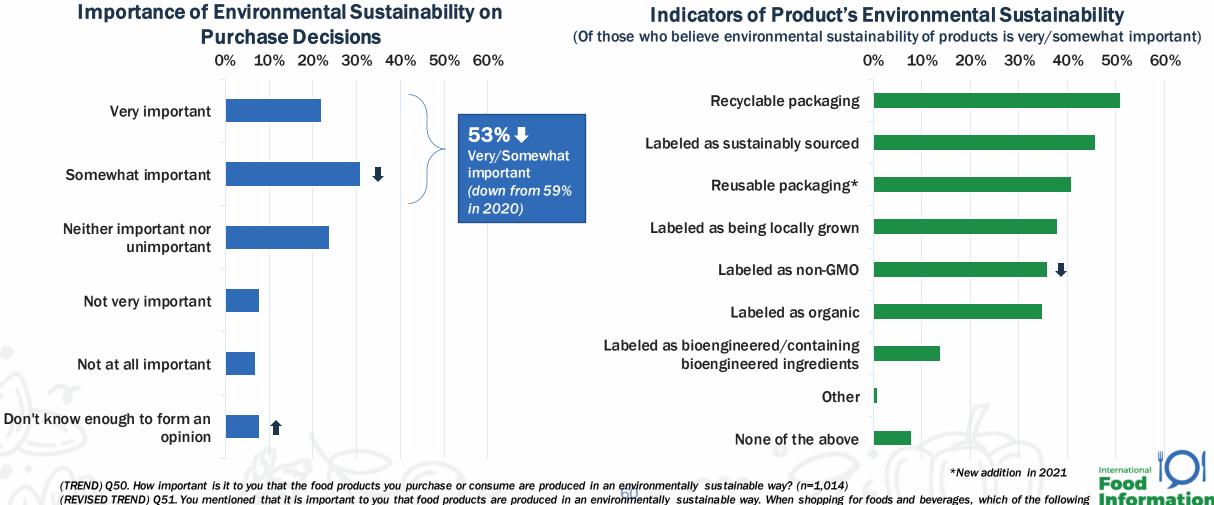
59 🥏

Importance of Food Production on Purchase Decisions

(TREND) Q49. How important are the following factors in your decision to purchase a food or beverage? (n=1,014) *New addition in 2021

Recyclable packaging, and sustainably sourced labels are key indicators of environmental sustainability

Although the importance of environmental sustainability is down slightly from 2020, it is still viewed as important by over half

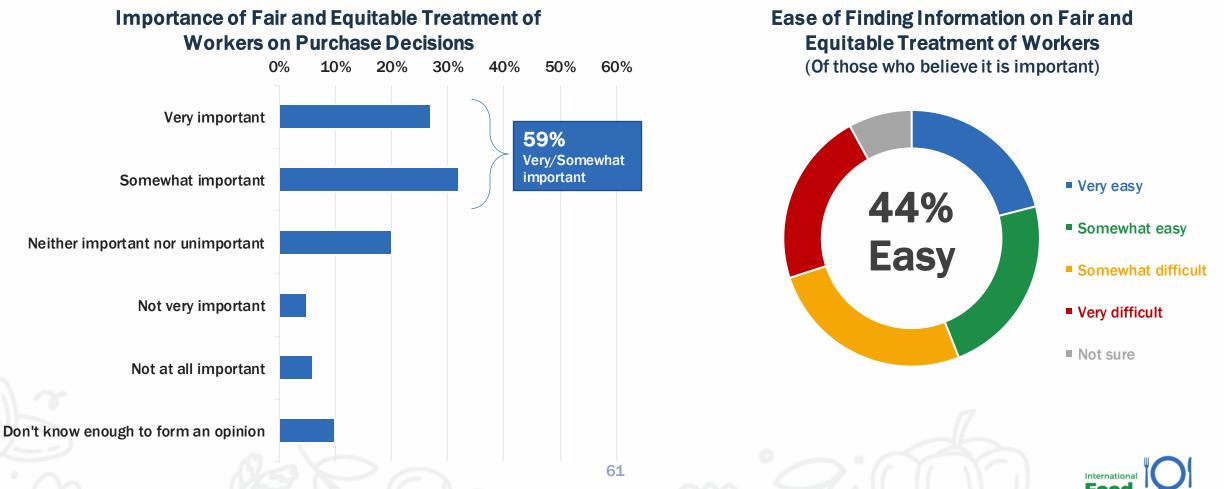


Council

(REVISED TREND) Q51. 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 an indication that a product is produced in an environmentally sustainable way? (Select all that apply.) (Very/somewhat important that products produced in environmentally sustainable way? (Select all that apply.) (Very/somewhat important that products produced in environmentally sustainable way? (Select all that apply.) (Very/somewhat important that products produced in environmentally sustainable way? (Select all that apply.) (Very/somewhat important that products produced in environmentally sustainable way?

Six in 10 Americans say fair and equitable treatment of food workers is important to them

African Americans are especially likely to see this as important; those who do find it important are mixed on how easy it is to actually find this information



Q52. How important is it to you that the food products you purchase or consume are produced in ways that are committed to the fair and equitable treatment of workers (e.g., farm hands, factory workers, retail and foodservice staff)? (n=1,014)

Q53. You mentioned fair and equitable treatment of workers is important to you. How easy or difficult is it for you to find this type of information about food producers, manufacturers, stores and restaurants? (Fair and equitable treatment of workers very/somewhat important, n=598)

Importance of fair and equitable treatment of food workers differs greatly by group

Parents, African Americans, and those who made an effort on social/food issues in 2020 tend to find fair and equitable treatment more important. Those groups also find it easier to find information on this topic than their counterparts.

(Of those who believe fair & equitable treatment of workers is important) %Very/Somewhat Important %Very/Somewhat Easy 0% 20% 40% 80% 0% 80% 20% 40% 60% 60% Total Total Has child(ren) under 18 Has child(ren) under 18 Does not have child(ren) under 18 Does not have child(ren) under 18 African American Non-Hispanic White African American Non-Hispanic White Made effort on social/food issues in 2020 No effort on social/food issues in 2020 Made effort on social/food issues in 2020 Excellent/Very good health No effort on social/food issues in 2020 Worse health College+ 18-34 years old <College 35+ years old 62

Importance of Fair and Equitable Treatment of Workers on Purchase Decisions

Ease of Finding Information on Fair and Equitable Treatment of Workers

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Info

Council

Q52. How important is it to you that the food products you purchase or consume are produced in ways that are committed to the fair and equitable treatment of workers (e.g., farm hands, factory workers, retail and foodservice staff)? (n=1,014)

Q53. You mentioned fair and equitable treatment of workers is important to you. How easy or difficult is it for you to find this type of information about food producers, manufacturers, stores and restaurants? (Fair and equitable treatment of workers very/somewhat important, n=598)

"Natural" labels are most impactful when grocery shopping in-store or online

Impact of Labels When Shopping Online

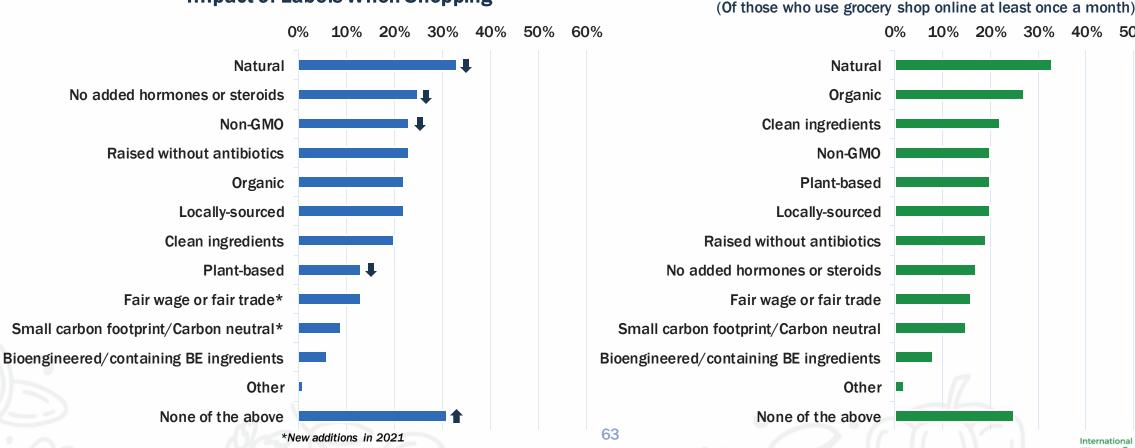
50%

Info

Council

60%

Natural, no added hormones/steroids, non-GMO and plant-based are all down somewhat vs. 2020



Impact of Labels When Shopping

(REVISED TREND) Q54. 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.) (n=1,014)

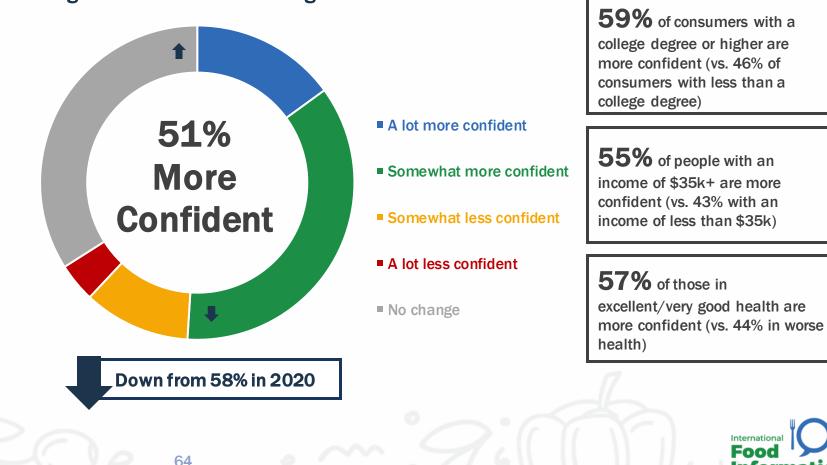
Q55. You mentioned that you buy groceries online at least occasionally. Which of the following, if any, do you do on a regular basis (that is, most times when you shop for foods and beverages online)? Select all that apply. Buy foods and beverages online because they are advertised as... (Of those who shop online at least once a month, n=412)

Knowledge of veterinarian oversight on antibiotics increases confidence in purchasing animal products for one in 2

This impact is down from 2020 (51% vs. 58%) although the movement is from "somewhat more confident" to "no change"

As part of 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 most antibiotics to fight illness in the animals.

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

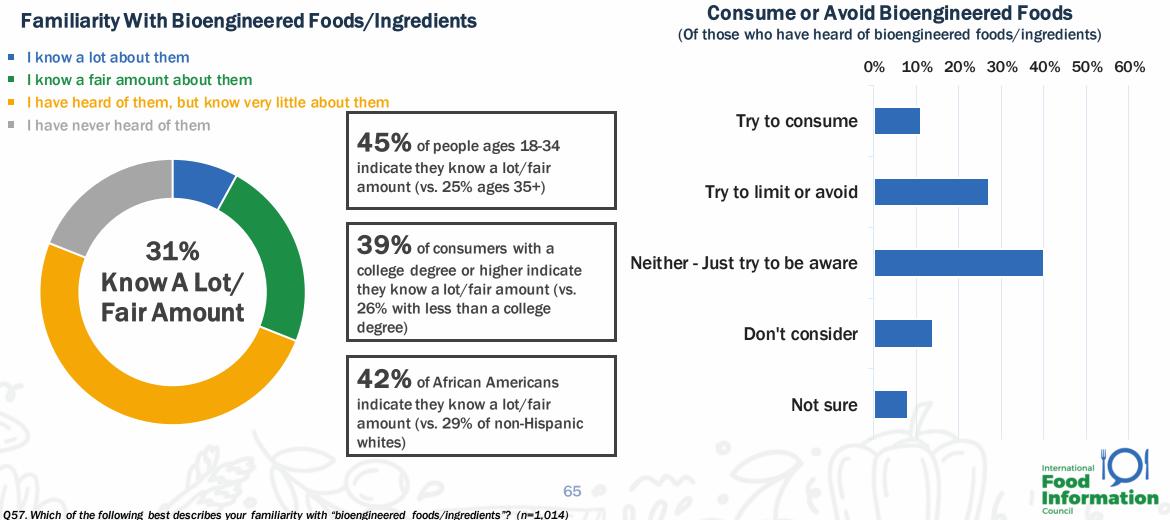


Change in Confidence Since Regulation of Antibiotics

(REVISED TREND) Q56. 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=1,014) *Slight wording change in 2021

Only 8% say they know a lot about bioengineered food and ingredients

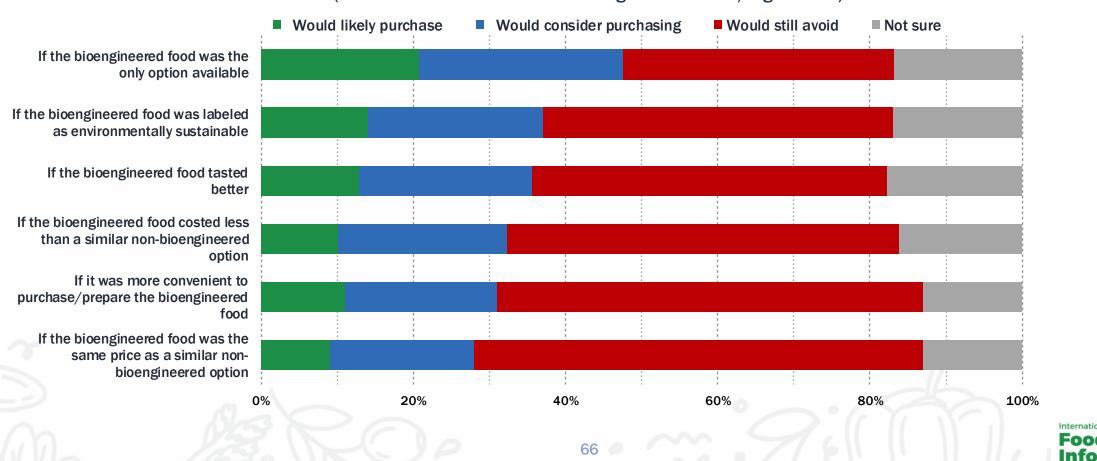
Younger consumers are more likely to know at least a fair amount; only 27% who have heard of BE foods say they are trying to limit or avoid them



Q58. Do you generally try to consume or avoid bioengineered foods or foods containing bioengineered ingredients? (If heard of bioengineered foods/ingredients, n=828)

Price is least likely to dissuade those limiting/avoiding BE foods

Those limiting/avoiding BE foods would be more likely to consider the products if there were no alternatives, if it was labeled as environmentally sustainable or if it tasted better



Would You Still Avoid Bioengineered Foods If They Had The Following Characteristics? (Of Those Who Limit or Avoid Bioengineered Foods/Ingredients)

Q59. You mentioned that you try to limit/avoid bioengineered foods or foods containing bioengineered ingredients. Would you still avoid bioengineered foods if they had the following characteristics? (n=227)

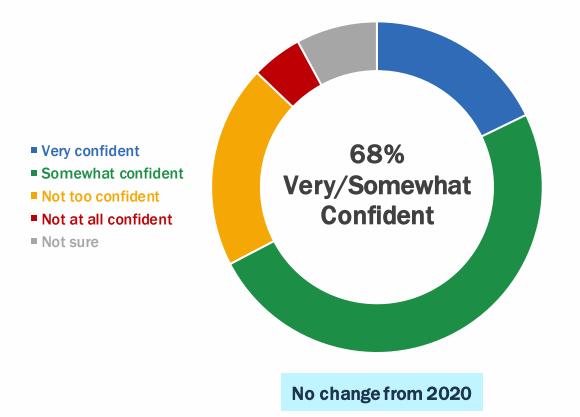
Council



Food Ingredients and Food Safety

Confidence in the safety of the U.S. food supply is unchanged since 2018

Seven in 10 are confident and 1 in 6 are very confident in the safety of the food supply; older consumers, those with higher education and income, men and those in better health are more confident



Confidence in the Safety of the US Food Supply

82% of people ages 65+ indicate that they are very/somewhat confident (vs. 64% under the age of 65)

72% of consumers with a college degree or higher indicate that they are very/somewhat confident (vs. 65% with less than a college degree)

74% of those with an income of \$35k+ indicate that they are very/somewhat confident (vs. 53% with an income of <\$35k)

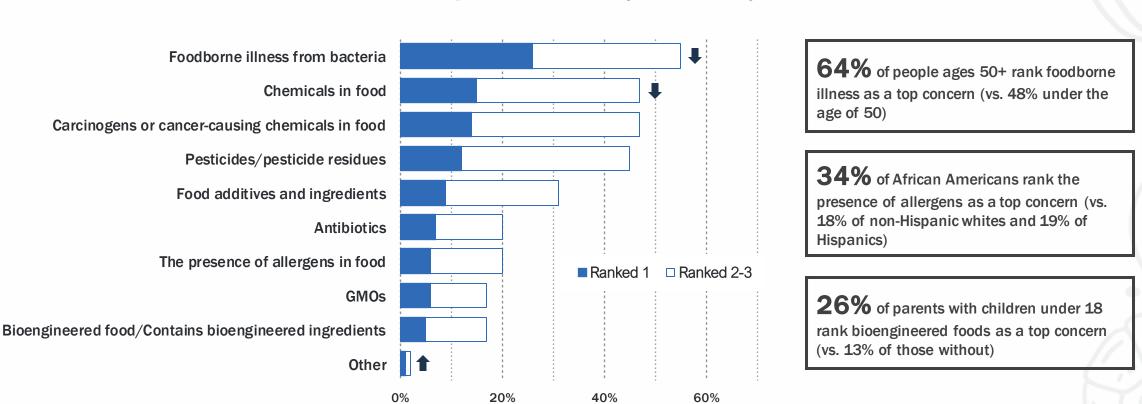
73% of men indicate that they are very/somewhat confident (vs. 63% of women)

73% of those in excellent/very good health indicate that they are very/somewhat confident (vs. 62% in worse health)



Foodborne illness remains the top food safety concern

Although the overall importance of foodborne illness and chemicals in foods are down vs. their pre-pandemic position in 2019, they are the top two safety concerns for Americans (as was the case in 2019)



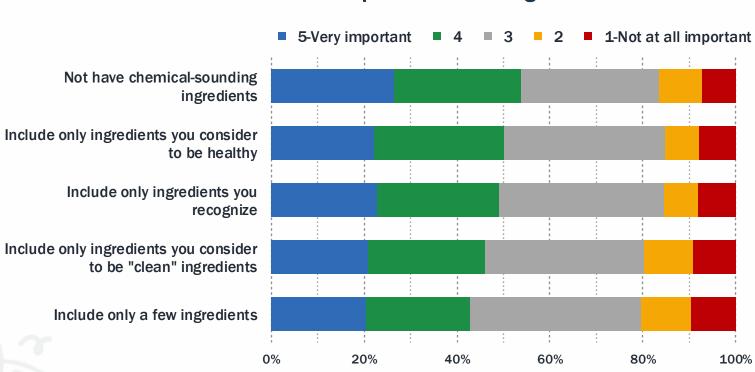
Most Important Food Safety Issues Today*

International Food Information Council

(TREND) Q61. What in your opinion are the three most important food safety issues today? (Please rank from 1 to 3, with 1=Most Important.) (n=1,014) *Note: Trend compared to 2019 (the 2020 version shifted temporarily to accommodate concerns about COVID-19)

Half say it is important to avoid chemical-sounding ingredients

While having only a few ingredients is important to 4 in 10, it clearly has less impact than familiarity and chemical-sounding names



Importance of the Ingredients List to...

Consumers with an income of \$35k+ are more likely than those with an income of less than \$35k to find the following important about ingredients labels:

Not have chemical-sounding ingredients (58% vs. 43%)

Include only ingredients you recognize (53% vs. 39%)

African Americans are more likely than non-Hispanic whites to find the following important about ingredients labels:

- Include only ingredients you consider to be healthy (67% vs. 45%)
- Include only ingredients you recognize (60% vs. 48%)
- Include only ingredients you consider to be "clean" ingredients (71% vs. 41%)
- Include only a few ingredients (60% vs. 39%)

Parents with children under 18 are more likely than those without children under 18 to find all options important



Avoidance of chemical-sounding names is about health and safety

Half who have concerns about chemical-sounding ingredients say their concern is related to both health and safety; only 19% say it is only about safety and only 17% say the same about healthfulness

Concern About Chemical-Sounding Ingredients Related To...? (Of those who believe not having chemical-sounding ingredients is important) **60%** of people age 50+ say their concern is 53% about both healthfulness and food safety (vs. 46% Both healthfulness and food safety ages 18-34) Both Whether the food/beverage is safe to consume **Healthfulness** How healthy that food/beverage would be for you **61%** of consumers who are married/partnered and Food Neither say their concern is about both healthfulness and Safety food safety (vs. 43% who are not) Not sure



Q66. Is your concern about chemical-sounding ingredients related to ...? (Of those who believe not having chemical-sounding ingredients is important, n=554)

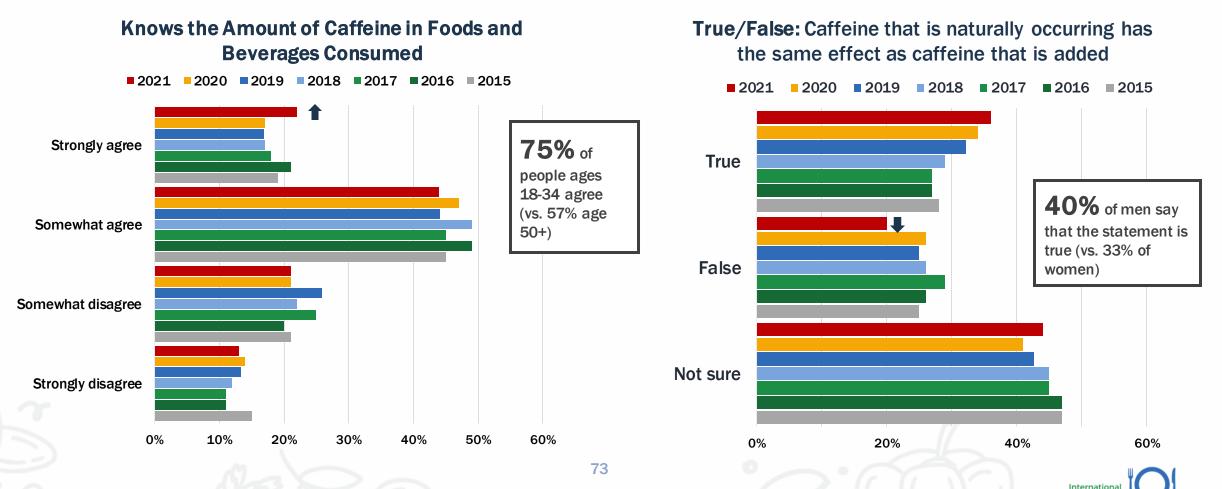
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Caffeine Consumption

Belief that all caffeine has the same effect continues to grow

Younger consumers are especially likely to believe they know the amount of caffeine they consume



Foo

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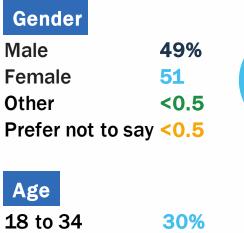
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(TREND) Q63: Please indicate how much you agree or disagree with the following statement: I know the amount of caffeine that is in the foods and beverages I consume. (Of those who consume caffeine, n=952) (TREND) Q64: Please indicate whether the following 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=1,014)



Demographics

Demographics







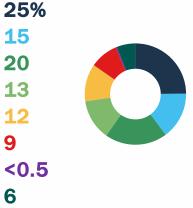


Race/Ethnicity (Multiple responses accepted)

White	69%
Hispanic/Latino/Spanish descent	17%
Black or African American	13%
Asian or Pacific Islander	7%
American Indian or Alaska Native	2%
Other	<0.5%

Household Income

Less than \$35,000 \$35,000 to \$49,999 \$50,000 to \$74,999 \$75,000 to \$99,999 \$100,000 to \$149,999 \$150,000 and above Don't know Prefer not to answer



9

6

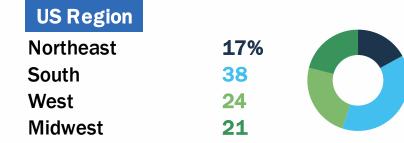
Education

Less than high school 3% Graduated high school 34 Some college 16 AA degree/technical/vocational 12 23 **Bachelor's degree** 12 Graduate/professional degree





Demographics



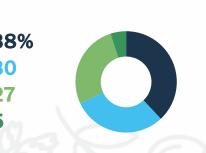
Type of Location

Suburban	469
Urban	29
Rural	16
Small town	9



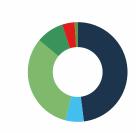
BMI Score

Normal or Low	389
Overweight	30
Obese	27
Prefer not to answer	5



Marital Status

Married
Living with partner
Single, never married
Divorced or separated
Widowed
Other



48%

6

9

4

1

32

Children's Ages

Newborn to 2 years old	4%
3 to 5 years old	6
6 to 8 years old	8
9 to 17 years old	15
18 or older	30
Do not have any children	44
Prefer not to say	2





Diagnosed Medical Conditions (Multiple responses accepted)		
High blood pressure	26%	
High cholesterol	22%	
Stress/Anxiety/Depression	19%	
Overweight/obesity	14%	
Diabetes	11%	
Gastrointestinal disorders	6%	
Food allergies	6%	
Osteoporosis	5%	
Heart disease	4%	
Cancer/cancer survivor	4%	
Attention deficit hyperactivity disorder (ADHD)	4%	
Decreased muscle strength/impaired mobility	3%	
Stroke	1%	
Alzheimer's disease or related forms of dementias	<0.5%	
Other	3%	
None of the above	41%	



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