



# Perceptions on Processed: Consumer Sentiment and Purchasing Habits

July 2021

# Methodology

One thousand and two interviews were conducted among adults ages 18+ from July 7 to July 15, 2021 and were weighted to ensure proportional results.

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

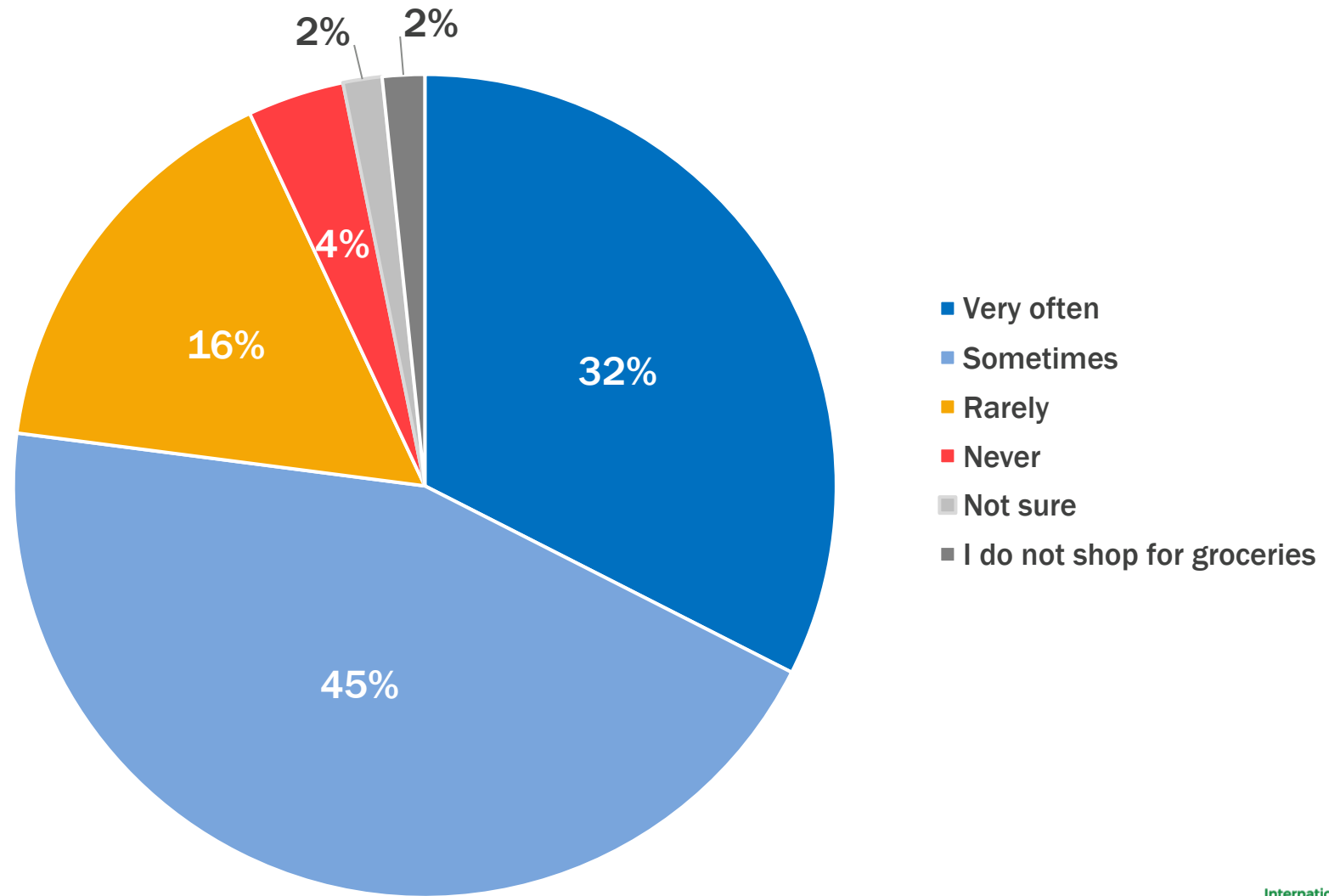
## Statistical Significance

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

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

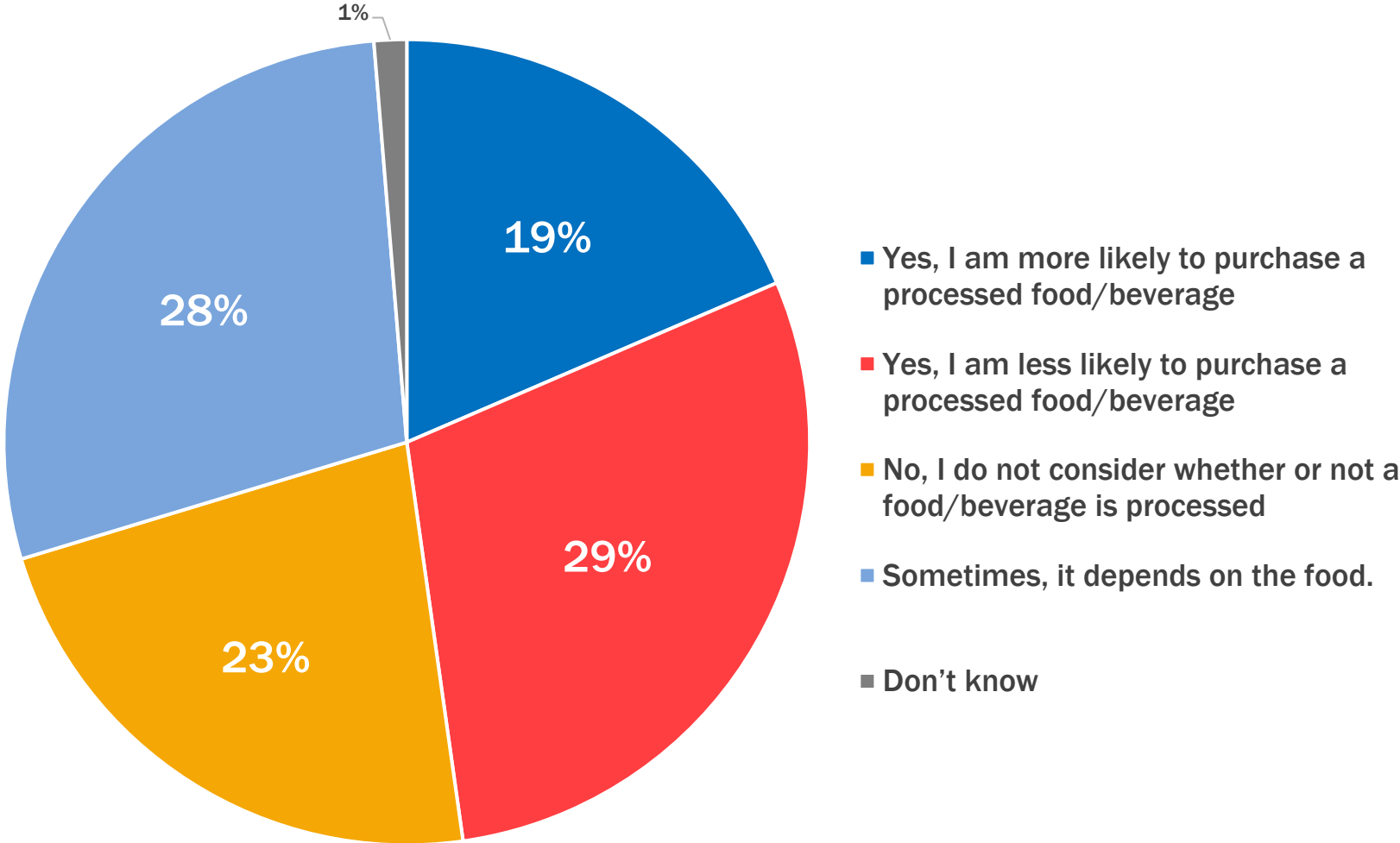


# More than three-quarters buy processed foods and beverages at least sometimes



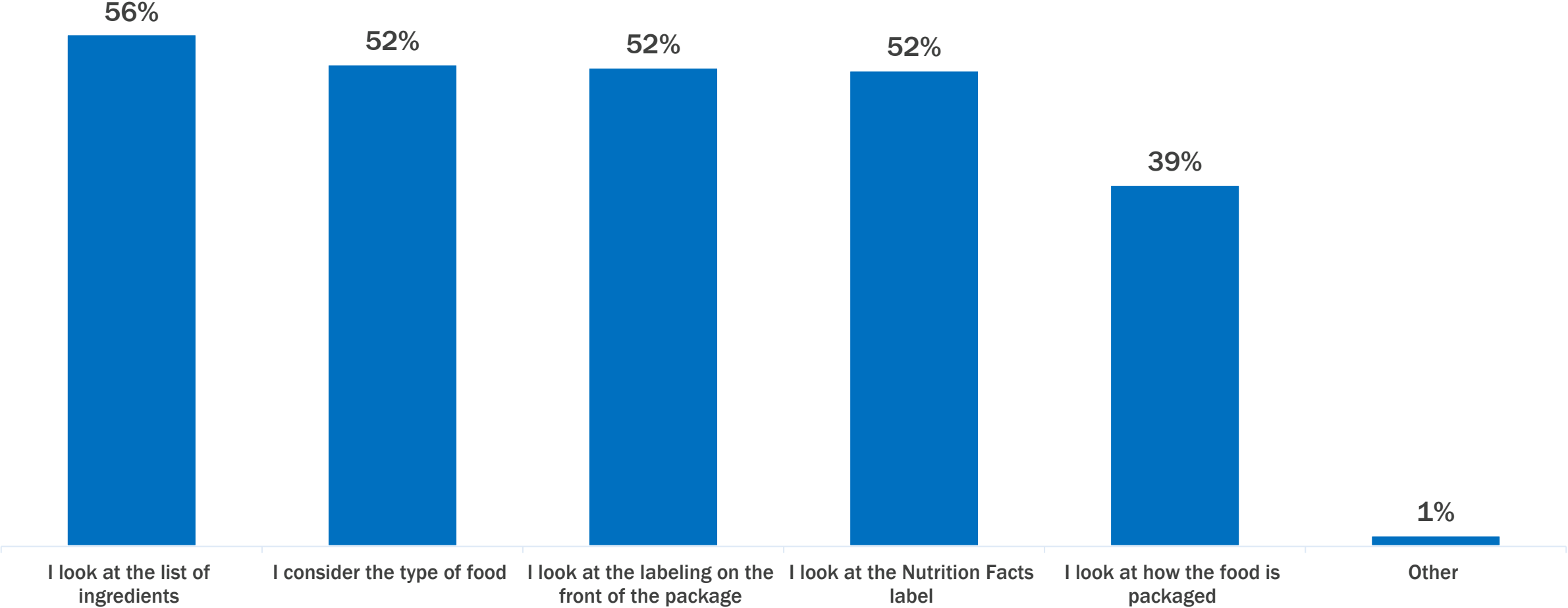
Q1. When shopping for groceries, how often do you buy processed foods and beverages? n=1,002

# Consumers split on whether they're more likely to purchase a food/beverage that's processed



Q2. [If A/B/C/D in Q1] When shopping for foods and beverages, do you consider whether they are processed before you purchase it? n=969

# Ingredient lists, type of food, front of package labels and the Nutrition Facts label are common ways consumers identify whether a food or beverage is processed

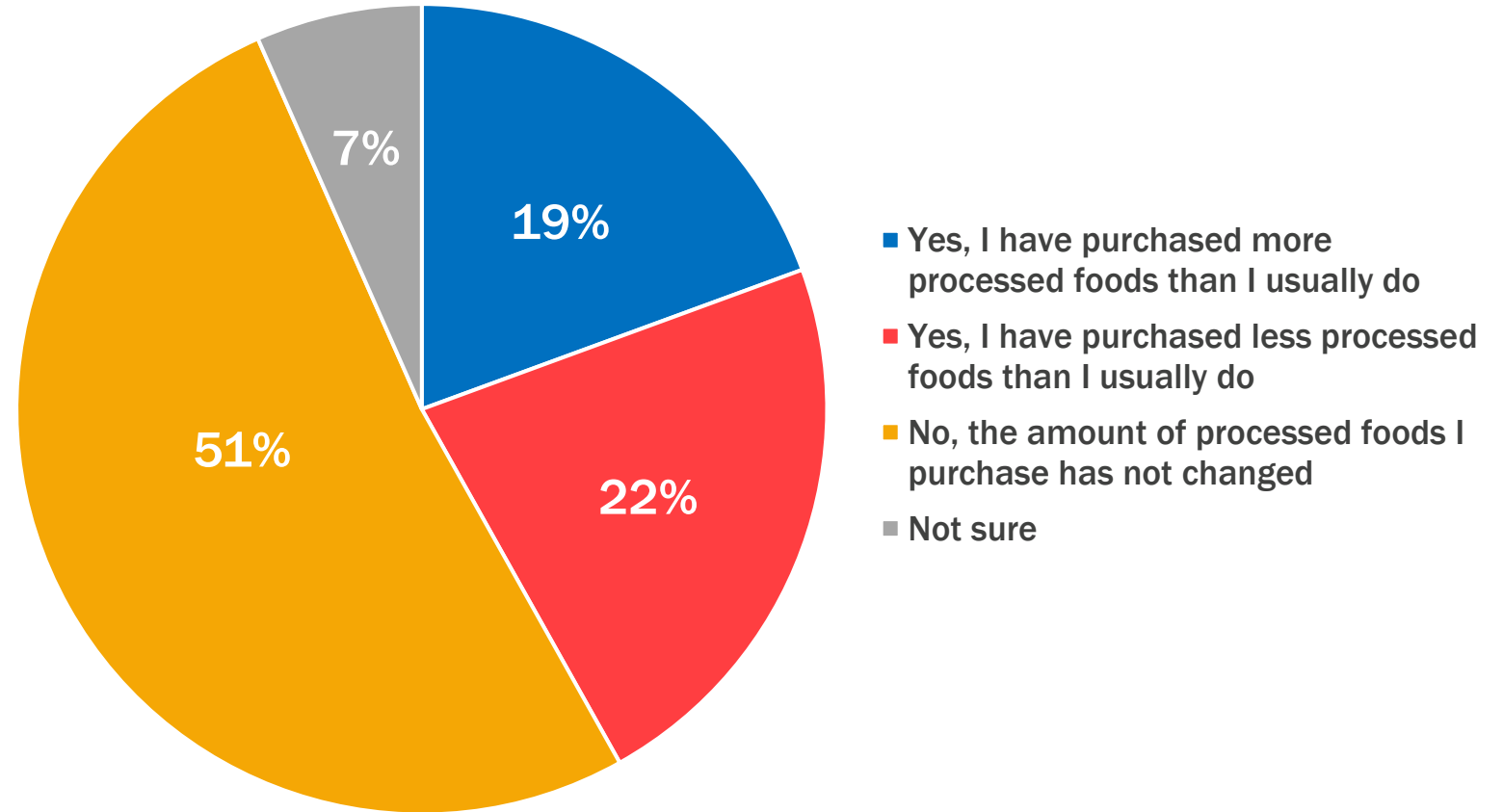


Q3. [If Q2= Yes/Sometimes]  
How do you decide whether a food or beverage is processed?  
Select all that apply. n=673



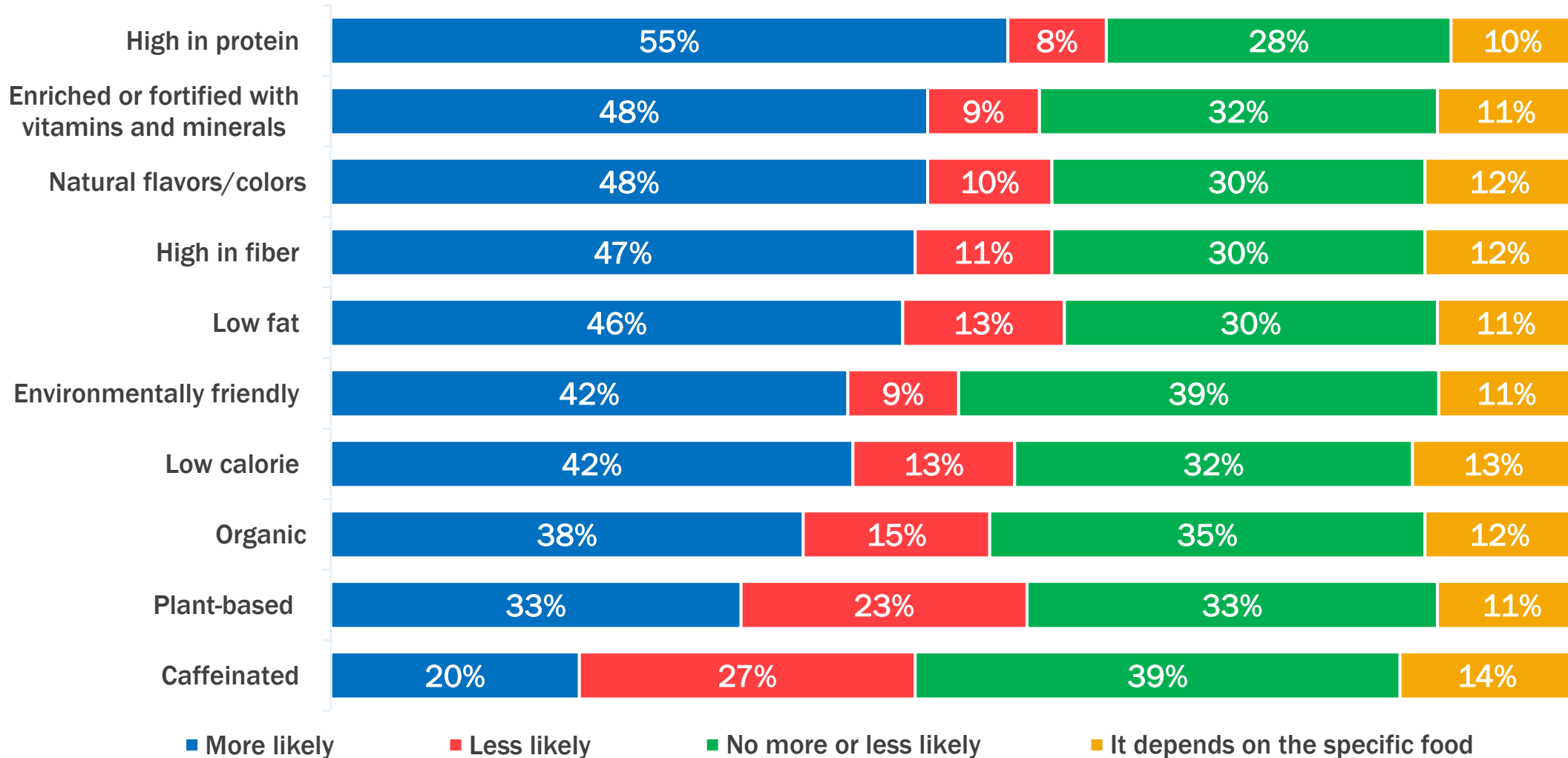
# Half of Americans haven't changed the amount of processed foods/beverages purchased over the past three months

Men, those earning \$80K+, those under age 45 and those with college degrees were more likely to have purchased **more processed foods**, compared to their counterparts



Q4. [If A/B/C/D to Q1] Over the past three months, has the amount of processed foods and beverages you are buying changed? n=969

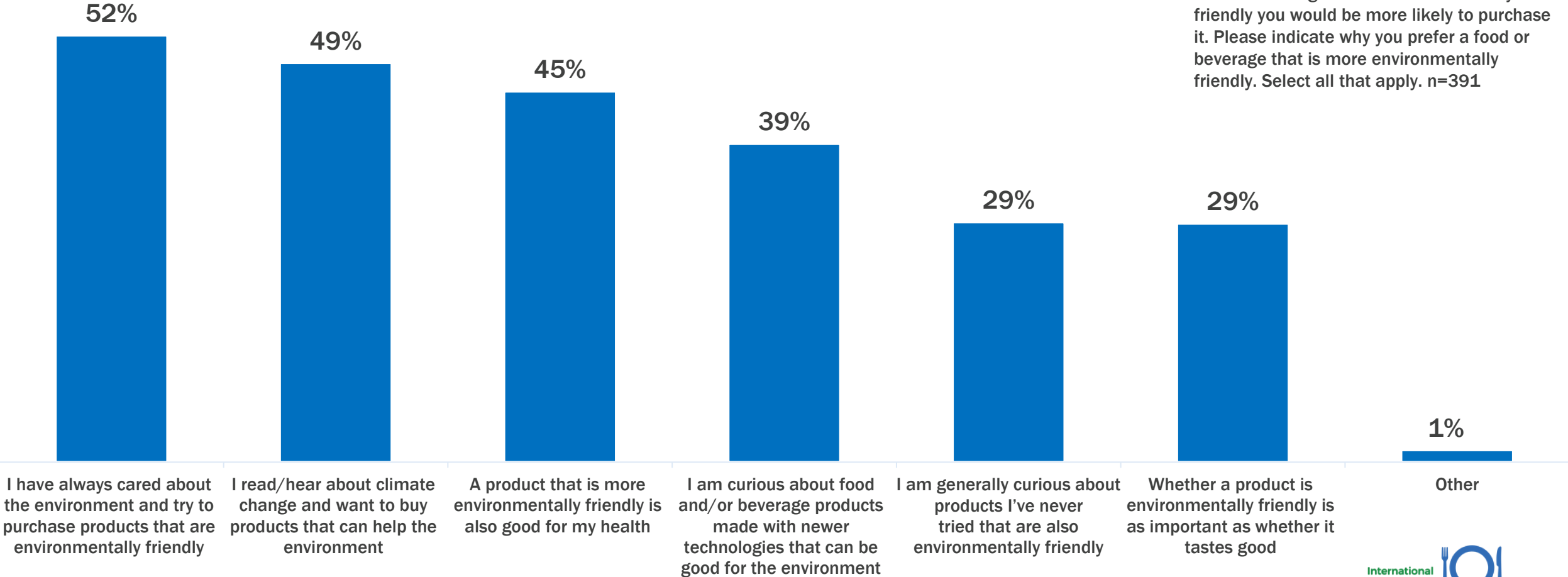
# Foods/beverages high in protein is the most commonly cited health/environmental purchase driver for processed foods



Q6. [If A/B/C/D to Q1] Please indicate whether any of the following health and/or environmental attributes would make you more or less likely to buy a processed food or beverage: n=969

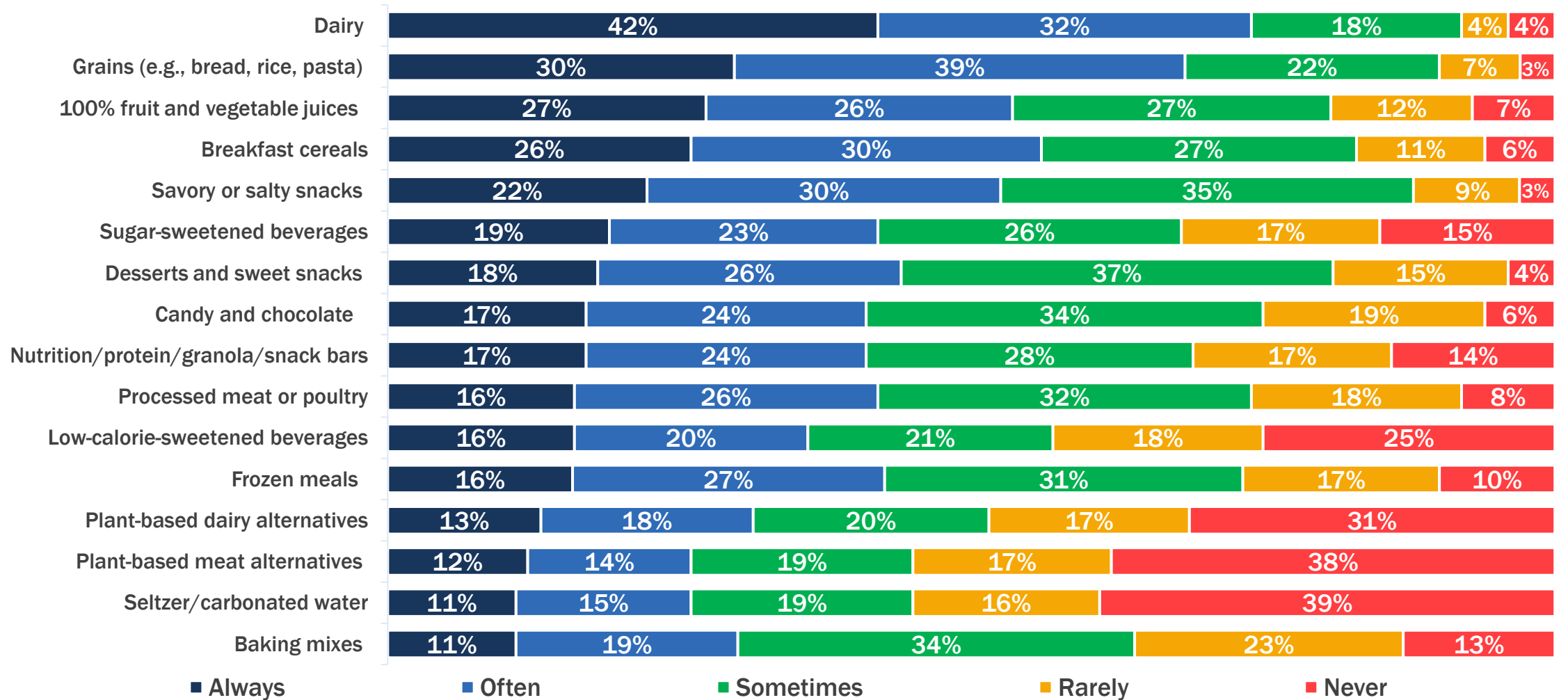
# For those who are more likely to purchase environmentally friendly processed foods/beverages, over half do so because they care about the environment

Q7. [If MORE likely to Environmentally friendly] You indicated that if a processed food or beverage is also environmentally friendly you would be more likely to purchase it. Please indicate why you prefer a food or beverage that is more environmentally friendly. Select all that apply. n=391



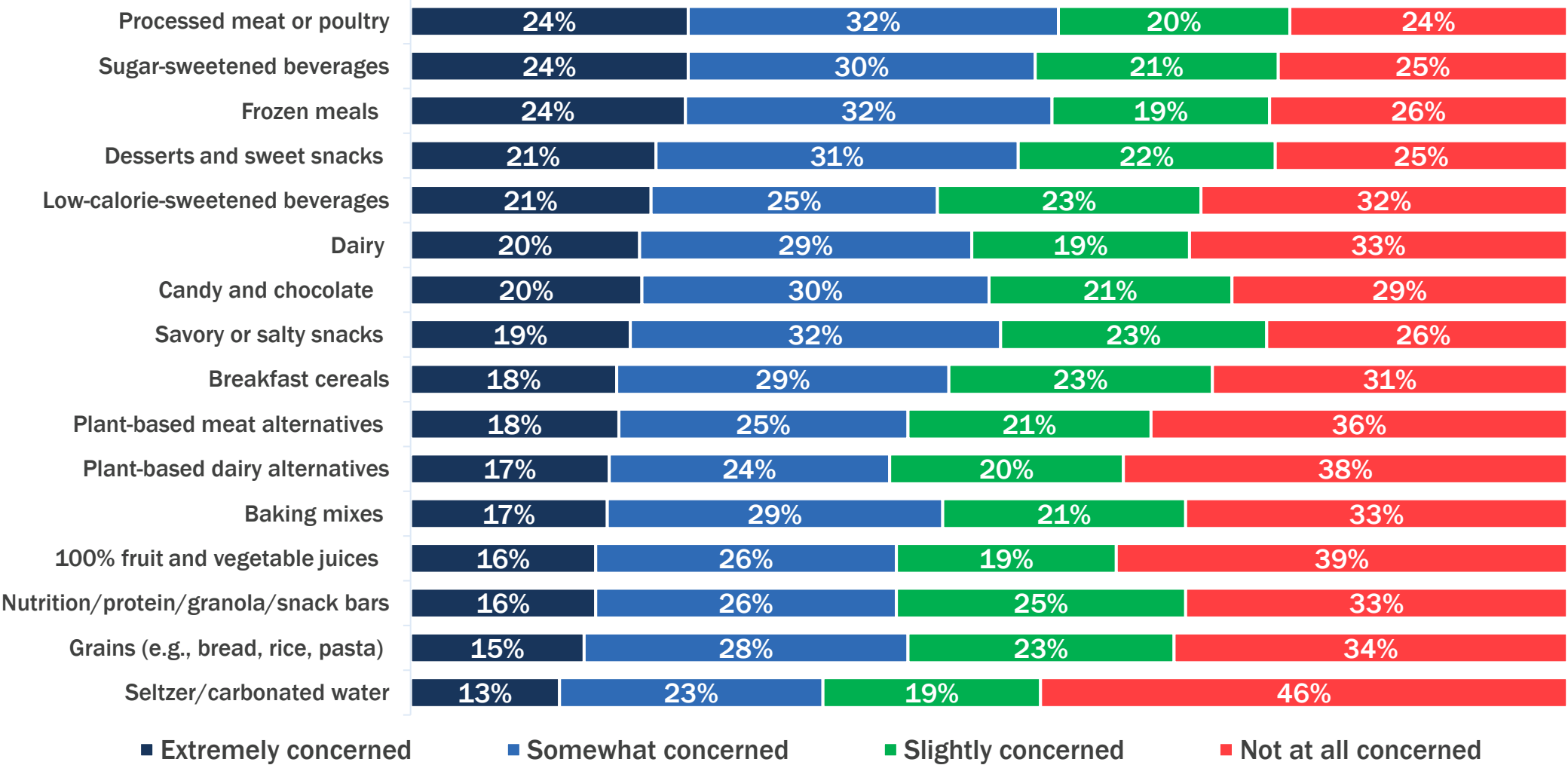


# When shopping for groceries, dairy is most frequently purchased food/beverage



Q8. [If A/B/C/D to Q1] Thinking about an average grocery shopping occasion (in person or online), how frequently do you purchase each of the following types of foods and beverages? n=969

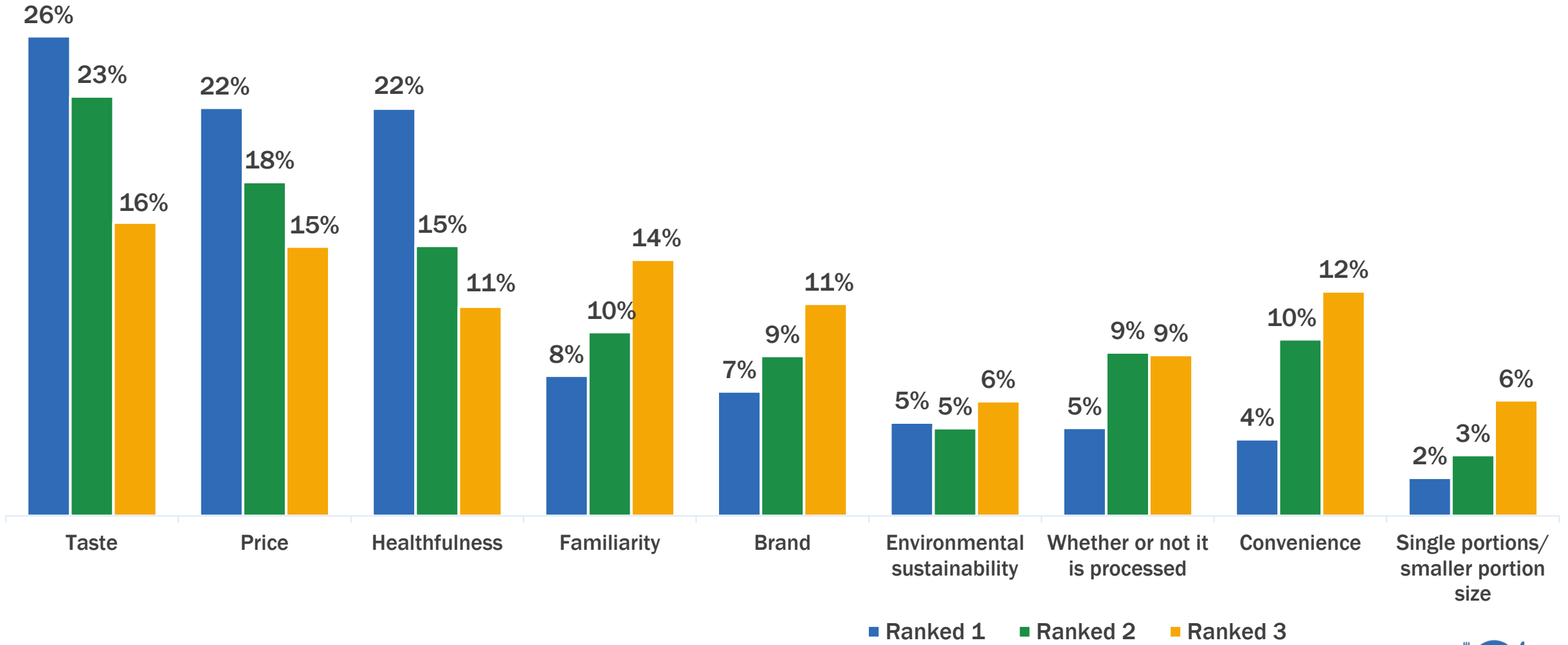
# Consumers split on level of concern about processing for different types of foods/beverages



Q9. [If A/B/C/D to Q1] How concerned are you with the amount of processing of each of these food and beverage categories?  
n=969

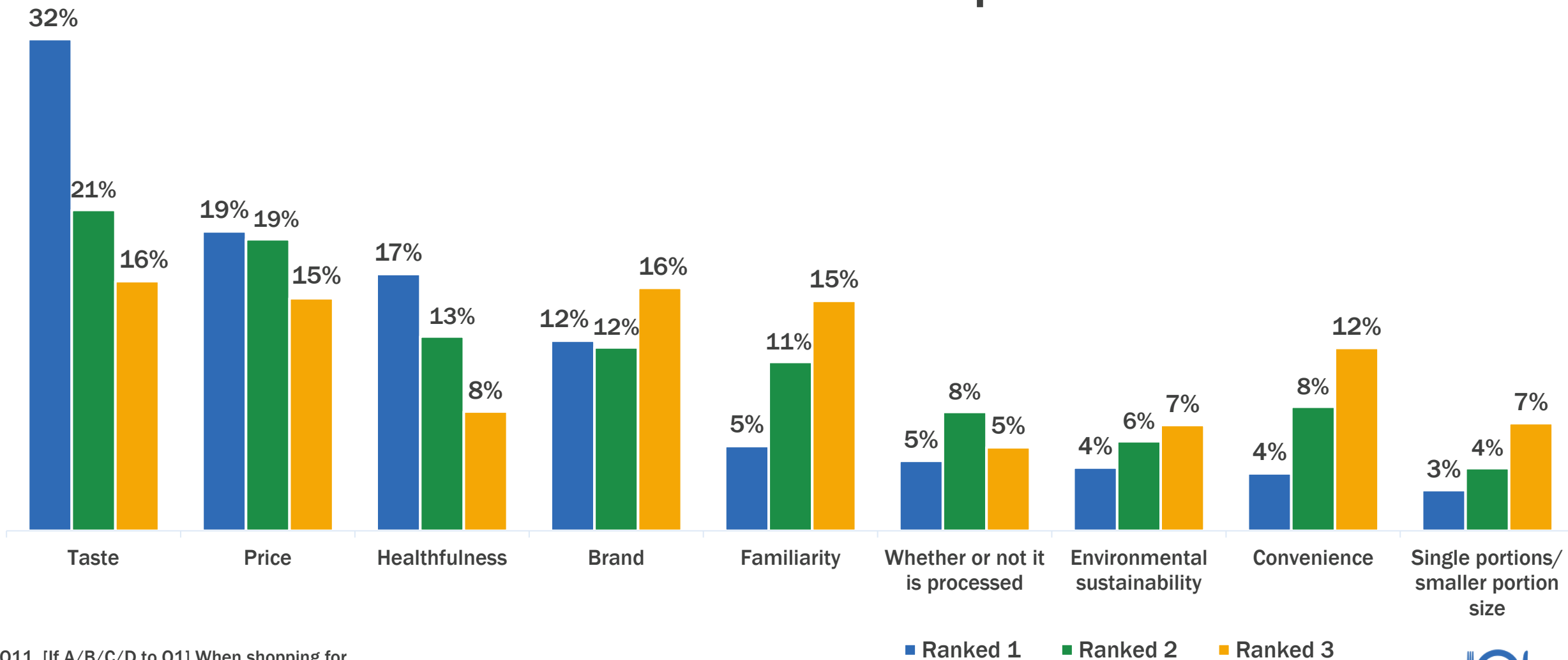


# When it comes to purchase drivers, taste, price and healthfulness greatly outrank whether a food is processed



Q10. [If A/B/C/D to Q1] When shopping for **foods**, please indicate how important each of these attributes are to you? Rank from 1 to 9, with 1=Most important to 9=Least important. % ranked 1,2,3 n=969

# Similar to shopping for food, taste, price and healthfulness greatly outrank whether a food is processed



Q11. [If A/B/C/D to Q1] When shopping for **beverages**, please indicate how important each of these attributes are to you? Rank from 1 to 9, with 1=Most important to 9=Least important. % ranked 1,2,3 n=969

# Appendix

Q1. When shopping for groceries, how often do you buy processed foods and beverages? n=1,002

	Very often	Sometimes	Rarely	Never	Not sure	I do not shop for groceries
Total	32%	45%	16%	4%	2%	2%
Men	34%	45%	13%	4%	1%	3% ↑
Women	31%	44%	18%	4%	2%	1% ↓
Less than \$40K	32%	45%	13%	5%	3% ↑	2%
\$40K-\$79K	27%	46%	23% ↑	3%	0%	1%
\$80K+	41% ↑	43%	14%	2%	1%	1%
White	36%	46%	12% ↓	3%	1%	1%
African American	24%	37%	27%	7%	2%	3%
Hispanic/ Latinx	30%	43%	20%	4%	2%	0%
Under 45	41% ↑	44%	10% ↓	3%	2%	1%
45-64	29%	44%	19%	4%	1%	2%
65+	16% ↓	49%	26% ↑	5%	2%	2%
Non-college	34%	43%	15%	3%	2%	2%
College	31%	46%	17%	4%	0% ↓	1%

Q2. [If A/B/C/D in Q1] When shopping for foods and beverages, do you consider whether they are processed before you purchase it? n=969

	Yes, I am more likely to purchase a processed food/beverage	Yes, I am less likely to purchase a processed food/beverage	Sometimes, it depends on the food	No, I do not consider whether or not a food/beverage is processed	Don't know
Total	19%	29%	23%	28%	1%
Men	27% ↑	26%	23%	23% ↓	1%
Women	11% ↓	32%	22%	33% ↑	2%
Less than \$40K	10% ↓	27%	25%	36% ↑	2%
\$40K-\$79K	13% ↓	35%	21%	29%	2%
\$80K+	37% ↑	28%	19%	15% ↓	0%
White	21%	25%	23%	30%	1%
African American	10%	40%	25%	25%	0%
Hispanic/ Latinx	20%	34%	19%	25%	2%
Under 45	31% ↑	24% ↓	18% ↓	25%	1%
45-64	9% ↓	31%	26%	33%	1%
65+	4% ↓	38% ↑	28%	28%	2%
Non-college	12% ↓	25% ↓	24%	38% ↑	2%
College	25% ↑	34% ↑	21%	20% ↓	1%

Q3. [If Q2= Yes/Sometimes] How do you decide whether a food or beverage is processed? Select all that apply. n=673

	I look at the list of ingredients	I consider the type of food	I look at the labeling on the front of the package	I look at the nutrition facts label	I look at how the food is packaged	Other
Total	56%	52%	52%	52%	39%	1%
Men	56%	53%	55%	52%	41%	1%
Women	55%	51%	49%	51%	37%	2%
Less than \$40K	54%	52%	47%	41% ↓	31% ↓	2% ↑
\$40K-\$79K	59%	50%	55%	55%	33%	0%
\$80K+	55%	51%	53%	58% ↑	51% ↑	0%
White	53%	52%	51%	49%	42%	1%
African American	63%	55%	61%	58%	33%	1%
Hispanic/ Latinx	63%	49%	46%	57%	34%	3%
Under 45	50% ↓	47%	49%	49%	44% ↑	1%
45-64	59%	58%	49%	51%	36%	2%
65+	63%	55%	65% ↑	60%	31%	2%
Non-college	50%	48%	46%	45% ↓	33% ↓	2%
College	60%	55%	56% ↑	57% ↑	44% ↑	0% ↓



Q4. [If A/B/C/D to Q1] Over the past three months, has the amount of processed foods and beverages you are buying changed? n=969

	Yes, I have purchased more processed foods than I usually do	Yes, I have purchased less processed foods than I usually do	No, the amount of processed foods I purchase has not changed	Not sure
Total	19%	22%	51%	7%
Men	25% ↑	20%	49%	5%
Women	14% ↓	24%	54%	8%
Less than \$40K	13% ↓	23%	57% ↑	7%
\$40K-\$79K	13% ↓	23%	58%	6%
\$80K+	37% ↑	23%	39% ↓	2% ↓
White	23%	19%	53%	5%
African American	10%	28%	53%	9%
Hispanic/ Latinx	17%	31%	41%	10%
Under 45	34% ↑	23%	39% ↓	4%
45-64	7% ↓	23%	62% ↑	8%
65+	5% ↓	21%	64% ↑	10%
Non-college	12% ↓	27% ↑	51%	9% ↑
College	27% ↑	18% ↓	52%	4% ↓

**Q6. [If A/B/C/D to Q1] Please indicate whether any of the following health and/or environmental attributes would make you more or less likely to buy a processed food or beverage: % More likely n=969**

	High in protein	Enriched or fortified with vitamins and minerals	Natural flavors/colors	High in fiber	Low fat	Environmentally friendly	Low calorie	Organic	Plant-based	Caffeinated
<b>Total</b>	55%	48%	48%	47%	46%	42%	42%	38%	33%	20%
<b>Men</b>	59%	56% ↑	51%	55% ↑	52% ↑	51% ↑	47% ↑	44% ↑	40% ↑	21%
<b>Women</b>	52%	41% ↓	45%	39% ↓	40% ↓	34% ↓	38%	33% ↓	26% ↓	19%
<b>Less than \$40K</b>	47% ↓	40% ↓	37% ↓	36% ↓	34% ↓	30% ↓	30% ↓	27% ↓	23% ↓	21%
<b>\$40K-\$79K</b>	55%	44%	49%	47%	48%	41%	41%	36%	26% ↓	16%
<b>\$80K+</b>	67% ↑	64% ↑	61% ↑	59% ↑	59% ↑	60% ↑	60% ↑	58% ↑	53% ↑	25%
<b>White</b>	55%	49%	49%	43%	45%	43%	42%	38%	32%	23%
<b>African American</b>	55%	47%	45%	57%	41%	41%	39%	43%	27%	13%
<b>Hispanic/ Latinx</b>	59%	49%	50%	54%	52%	41%	47%	38%	40%	19%
<b>Under 45</b>	57%	52%	52%	44%	47%	50% ↑	46%	46% ↑	43% ↑	29% ↑
<b>45-64</b>	51%	47%	43%	46%	40%	37%	35% ↓	31% ↓	24% ↓	15% ↓
<b>65+</b>	57%	42%	49%	55%	52%	33% ↓	46%	35%	21% ↓	7% ↓
<b>Non-college</b>	48% ↓	42% ↓	44% ↓	38% ↓	38% ↓	34% ↓	32% ↓	30% ↓	24% ↓	20%
<b>College</b>	62% ↑	55% ↑	53% ↑	55% ↑	53% ↑	50% ↑	51% ↑	46% ↑	40% ↑	20%

Q7. [If MORE likely to Environmentally friendly] You indicated that if a processed food or beverage is also environmentally friendly you would be more likely to purchase it. Please indicate why you prefer a food or beverage that is more environmentally friendly. Select all that apply. n=391

	I have always cared about the environment and try to purchase products that are environmentally friendly	I read/hear about climate change and want to buy products that can help the environment	A product that is more environmentally friendly is also good for my health	I am curious about food and/or beverage products made with newer technologies that can be good for the environment	I am generally curious about products I've never tried that are also environmentally friendly	Whether a product is environmentally friendly is as important as whether it tastes good	Other
Total	52%	49%	45%	39%	29%	29%	1%
Men	51%	50%	46%	43%	31%	28%	1%
Women	54%	47%	44%	34%	27%	30%	2%
Less than \$40K	52%	43%	38%	34%	26%	30%	3%
\$40K-\$79K	49%	42%	39%	33%	22%	21%	0%
\$80K+	56%	56%	54% ↑	44%	37%	34%	1%
White	54%	51%	45%	39%	31%	28%	1%
African American	40%	43%	47%	42%	16%	33%	5%
Hispanic/ Latinx	44%	47%	48%	43%	44%	33%	0%
Under 45	51%	48%	50%	42%	33%	31%	0% ↓
45-64	52%	46%	36%	37%	27%	27%	2%
65+	60%	59%	46%	30%	18%	27%	7% ↑
Non-college	51%	40% ↓	42%	33%	30%	27%	1%
College	53%	55% ↑	48%	43%	29%	31%	2%

Q8. [If A/B/C/D to Q1] Thinking about an average grocery shopping occasion (in person or online), how frequently do you purchase each of the following types of foods and beverages? % Always n=969

	Dairy	Grains	100% fruit and vegetable juices	Breakfast cereals	Savory or salty snacks	Sugar-sweetened beverages	Desserts and sweet snacks	Candy and chocolate
Total	42%	30%	27%	26%	22%	19%	18%	17%
Men	38%	30%	30%	28%	24%	18%	19%	19%
Women	45%	30%	25%	25%	21%	21%	17%	15%
Less than \$40K	38%	29%	22% ↓	23%	21%	23%	19%	15%
\$40K-\$79K	43%	28%	23%	26%	20%	13% ↓	13%	14%
\$80K+	46%	34%	39% ↑	31%	26%	21%	22%	22% ↑
White	46%	30%	27%	29%	25%	22%	20%	18%
African American	31%	26%	26%	17%	15%	11%	13%	9%
Hispanic/ Latinx	41%	39%	35%	24%	19%	14%	19%	20%
Under 45	42%	36% ↑	32% ↑	31% ↑	28% ↑	27% ↑	24% ↑	23% ↑
45-64	43%	25%	24%	23%	20%	16%	14%	13%
65+	40%	24%	21%	21%	12% ↓	4% ↓	10% ↓	7% ↓
Non-college	44%	30%	25%	26%	22%	21%	19%	16%
College	40%	31%	30%	26%	22%	17%	17%	17%

Q8. [If A/B/C/D to Q1] Thinking about an average grocery shopping occasion (in person or online), how frequently do you purchase each of the following types of foods and beverages? % Always n=969

	Nutrition/ protein/granola/ snack bars	Processed meat or poultry	Low-calorie- sweetened beverages	Frozen meals	Plant-based dairy alternatives	Plant-based meat alternatives	Seltzer/carbonated water	Baking mixes
Total	17%	16%	16%	16%	13%	12%	11%	11%
Men	20%	19%	17%	18%	15%	16% ↑	14% ↑	14%
Women	14%	14%	15%	14%	11%	8% ↓	8% ↓	9%
Less than \$40K	11% ↓	15%	13%	17%	9% ↓	7% ↓	6% ↓	9%
\$40K-\$79K	17%	15%	15%	12%	12%	8%	9%	8%
\$80K+	27% ↑	21%	23% ↑	20%	22% ↑	24% ↑	21% ↑	18% ↑
White	20%	19%	19%	18%	15%	13%	13%	13%
African American	10%	10%	9%	8%	5%	4%	5%	7%
Hispanic/ Latinx	11%	16%	12%	14%	13%	13%	9%	11%
Under 45	27% ↑	24% ↑	22% ↑	22% ↑	21% ↑	23% ↑	17% ↑	18% ↑
45-64	9% ↓	10% ↓	12% ↓	12%	7% ↓	2% ↓	6% ↓	5% ↓
65+	6% ↓	6% ↓	9% ↓	8% ↓	7% ↓	3% ↓	3% ↓	6%
Non-college	14%	15%	15%	16%	10% ↓	7% ↓	8% ↓	10%
College	20%	17%	17%	16%	17% ↑	16% ↑	14% ↑	13%

Q9. [If A/B/C/D to Q1] How concerned are you with the amount of processing of each of these food and beverage categories? %  
Extremely concerned n=969

	Processed meat or poultry	Sugar-sweetened beverages	Frozen meals	Desserts and sweet snacks	Low-calorie-sweetened beverages	Dairy	Candy and chocolate	Savory or salty snacks
Total	24%	24%	24%	21%	21%	20%	20%	19%
Men	25%	27%	22%	24%	22%	23%	23%	21%
Women	24%	21%	26%	19%	20%	16%	17%	16%
Less than \$40K	18% ↓	16% ↓	17% ↓	16% ↓	16% ↓	15% ↓	14% ↓	12% ↓
\$40K-\$79K	26%	24%	25%	21%	18%	17%	20%	18%
\$80K+	32% ↑	34% ↑	32% ↑	31% ↑	30% ↑	30% ↑	30% ↑	30% ↑
White	23%	22%	24%	20%	20%	18%	19%	18%
African American	32%	33%	33%	33%	30%	28%	22%	23%
Hispanic/ Latinx	24%	21%	14%	13%	16%	19%	22%	17%
Under 45	27%	27%	25%	25% ↑	22%	25% ↑	26% ↑	23% ↑
45-64	22%	19%	24%	18%	18%	16%	16%	15%
65+	23%	26%	20%	17%	23%	12% ↓	12% ↓	15%
Non-college	18% ↓	17% ↓	19% ↓	16% ↓	16% ↓	14% ↓	16% ↓	13% ↓
College	30% ↑	30% ↑	28% ↑	26% ↑	25% ↑	25% ↑	23% ↑	24% ↑

Q9. [If A/B/C/D to Q1] How concerned are you with the amount of processing of each of these food and beverage categories?

% Extremely concerned n=969

	Breakfast cereals	Plant-based meat alternatives	Plant-based dairy alternatives	Baking mixes	100% fruit and vegetable juices	Nutrition/protein/granola/snack bars	Grains	Seltzer/carbonated water
Total	18%	18%	17%	17%	16%	16%	15%	13%
Men	21%	21%	21%	21%	20%	19%	19% ↑	16%
Women	15%	16%	14%	14%	13%	13%	12% ↓	10%
Less than \$40K	11% ↓	13% ↓	14%	11% ↓	12% ↓	12% ↓	9% ↓	7% ↓
\$40K-\$79K	17%	15%	15%	19%	12%	13%	14%	9%
\$80K+	29% ↑	28% ↑	25% ↑	27% ↑	27% ↑	26% ↑	27% ↑	26% ↑
White	17%	18%	16%	17%	16%	15%	16%	13%
African American	29%	25%	19%	23%	23%	17%	16%	16%
Hispanic/ Latinx	11%	10%	19%	14%	9%	16%	11%	8%
Under 45	22% ↑	22%	21% ↑	23% ↑	22% ↑	20% ↑	22% ↑	19% ↑
45-64	15%	13% ↓	13%	12% ↓	13%	12%	10% ↓	9%
65+	11% ↓	21%	14%	13%	9% ↓	11%	9%	6% ↓
Non-college	12% ↓	13% ↓	14% ↓	12% ↓	11% ↓	10% ↓	9% ↓	8% ↓
College	23% ↑	23% ↑	20% ↑	23% ↑	21% ↑	21% ↑	21% ↑	18% ↑

Q10. [If A/B/C/D to Q1] When shopping for foods, please indicate how important each of these attributes are to you?

Rank from 1 to 9, with 1=Most important to 9=Least important. % Ranked 1 n=969

	Taste	Price	Healthfulness	Familiarity	Brand	Environmental sustainability	Whether or not it is processed	Convenience	Single portions
Total	26%	22%	22%	8%	7%	5%	5%	4%	2%
Men	22%	20%	23%	10%	7%	7%	5%	4%	2%
Women	30%	23%	21%	6%	6%	3%	4%	4%	2%
Less than \$40K	27%	28% ↑	16% ↓	8%	8%	3% ↓	5%	4%	2%
\$40K-\$79K	27%	28% ↑	19%	6%	5%	5%	6%	2%	2%
\$80K+	22%	8% ↓	33% ↑	9%	7%	8% ↑	4%	6%	2%
White	29%	21%	20%	8%	7%	5%	3%	5%	2%
African American	21%	22%	22%	9%	9%	3%	8%	3%	3%
Hispanic/Latinx	17%	27%	32%	5%	3%	6%	6%	2%	1%
Under 45	22%	21%	24%	7%	7%	7% ↑	4%	6%	2%
45-64	32% ↑	25%	18%	7%	7%	3%	5%	2%	2%
65+	23%	20%	26%	10%	6%	2%	8%	3%	2%
Non-college	28%	28% ↑	17% ↓	6%	6%	4%	5%	4%	2%
College	24%	16% ↓	27% ↑	9%	7%	6%	4%	4%	2%



Q11. [If A/B/C/D to Q1] When shopping for beverages, please indicate how important each of these attributes are to you?

Rank from 1 to 9, with 1=Most important to 9=Least important. % Ranked 1 n=969

	Taste	Price	Healthfulness	Brand	Familiarity	Whether or not it is processed	Environmental sustainability	Convenience	Single portions
Total	32%	19%	17%	12%	20%	13%	8%	4%	3%
Men	28%	19%	20%	12%	18%	10%	8%	3%	4%
Women	35%	20%	13%	12%	21%	15%	9%	4%	2%
Less than \$40K	36%	26% ↑	10% ↓	11%	12% ↓	14%	11%	4%	1%
\$40K-\$79K	29%	23%	15%	11%	23%	12%	6%	4%	1%
\$80K+	27%	8% ↓	27% ↑	14%	24%	13%	7%	4%	6% ↑
White	34%	20%	13%	13%	20%	13%	8%	4%	3%
African American	37%	16%	20%	14%	15%	18%	10%	2%	2%
Hispanic/Latinx	17%	18%	26%	7%	19%	5%	13%	7%	2%
Under 45	26% ↓	20%	17%	11%	17%	12%	9%	6% ↑	3%
45-64	38% ↑	20%	14%	15%	24%	12%	10%	2%	2%
65+	33%	17%	21%	11%	17%	18%	3%	1%	3%
Non-college	35%	23% ↑	12% ↓	11%	19%	12%	11%	3%	2%
College	28%	15% ↓	21% ↑	13%	21%	14%	6%	4%	4%



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@foodinsight



@foodinsight



@FoodInsightTV



International Food  
Information Council