



# Perceptions on Processed: Consumer Sentiment and Purchasing Habits

October 2022

# Methodology

One thousand interviews were conducted among adults ages 18+ from September 7-September 13, 2022 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.).

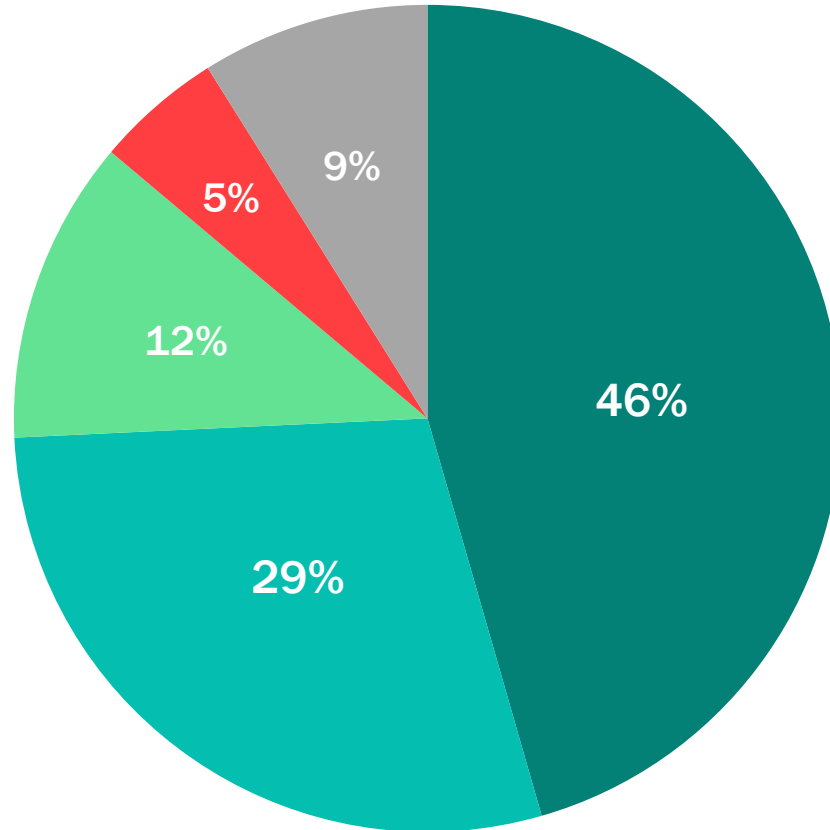
For example, if the responses from female respondents is considered to be significant, it is in relation to male respondents and not necessarily other demographic groups.



# Nearly half report having a high understanding of processed foods

Men, those earning \$80K+, white people, those under age 45 and those with college degrees were more likely to report a **high** understanding, compared to their counterparts

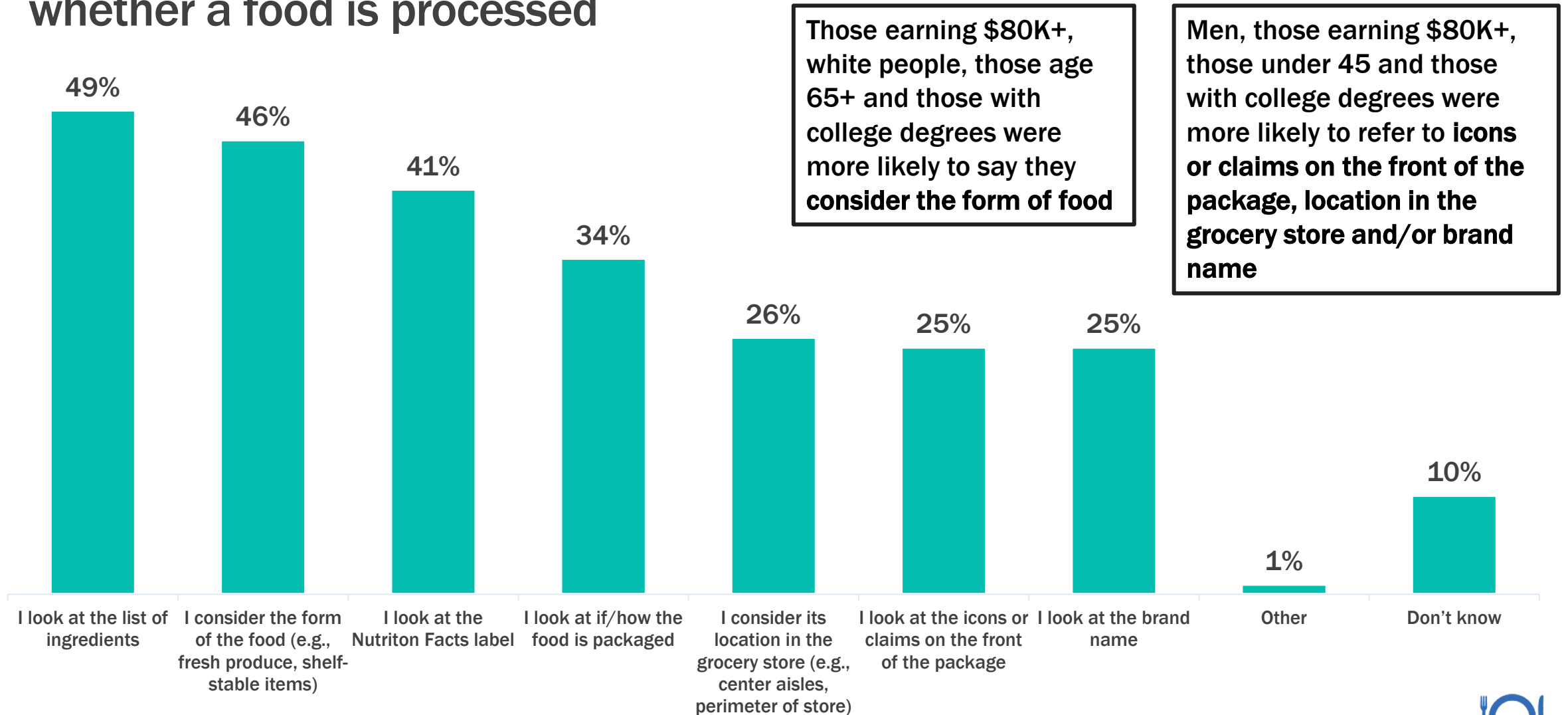
Women, those earning less than \$40K and those without college degrees were more likely to report having a **very low** understanding, compared to their counterparts



- I can easily explain what processed foods are and identify examples of processed foods
- I can only somewhat explain what processed foods are, but I can easily identify examples of processed foods
- I cannot really explain what processed foods are, but I can identify some examples of processed foods
- I can neither explain what processed foods are nor identify examples of processed foods
- Not sure

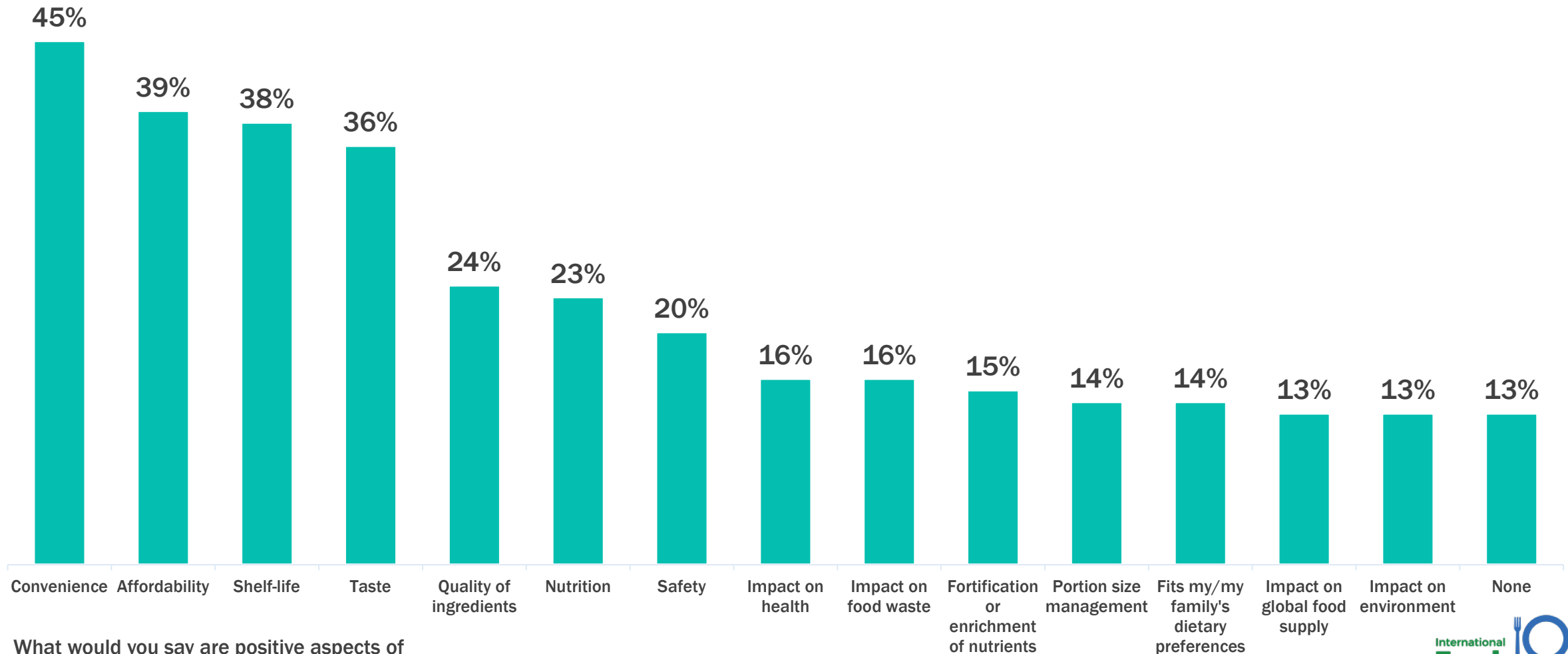
How would you describe your level of understanding of processed foods?

# The ingredients list is the most common reference point for deciding whether a food is processed



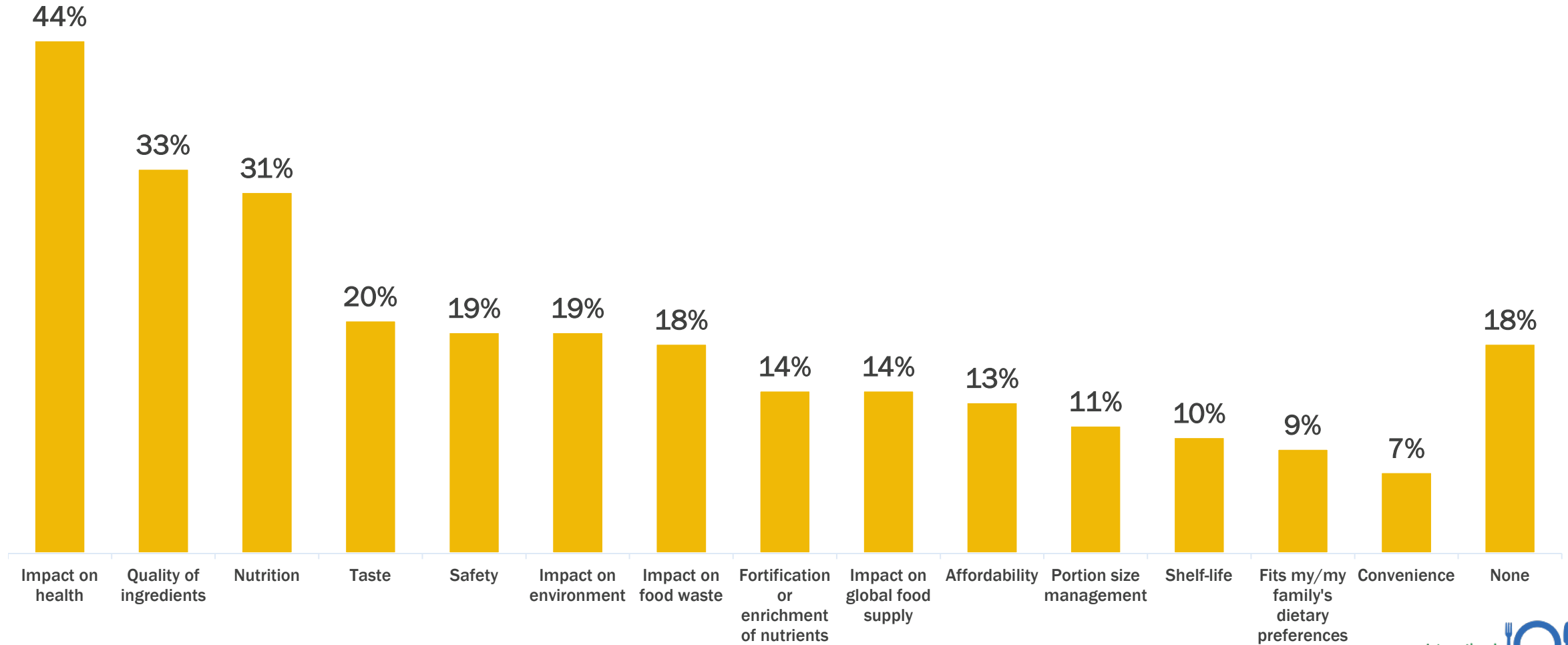
How would you decide whether a food or beverage is processed? Select all that apply.

# Convenience, affordability, shelf-life and taste are viewed as the most positive aspects of processed foods



What would you say are positive aspects of processed foods, if any? Select all that apply.

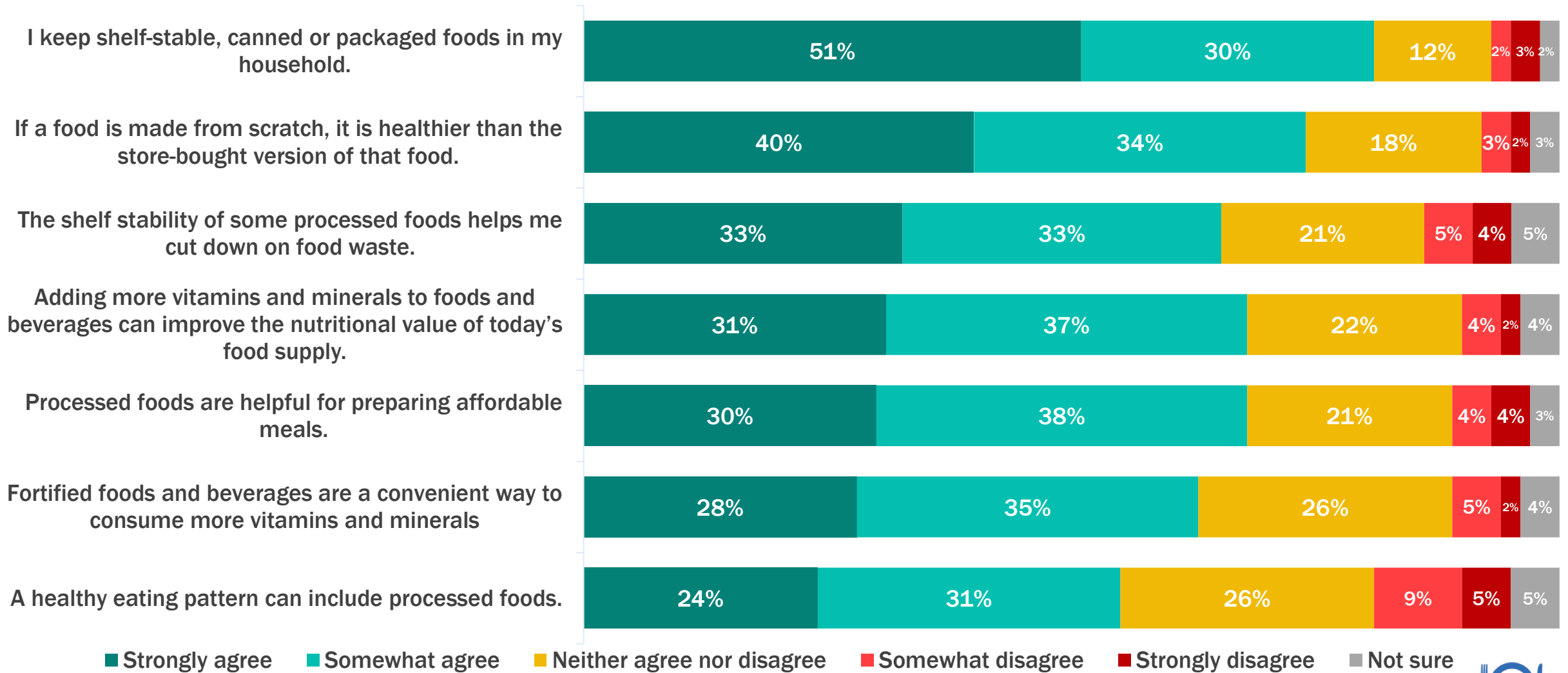
# Impact on health, ingredient quality and nutrition are viewed as the most negative aspects of processed food



What would you say are negative aspects of processed foods, if any? Select all that apply.



# 8 in 10 keep processed foods in their household; far fewer believe that they can be part of a healthy eating pattern

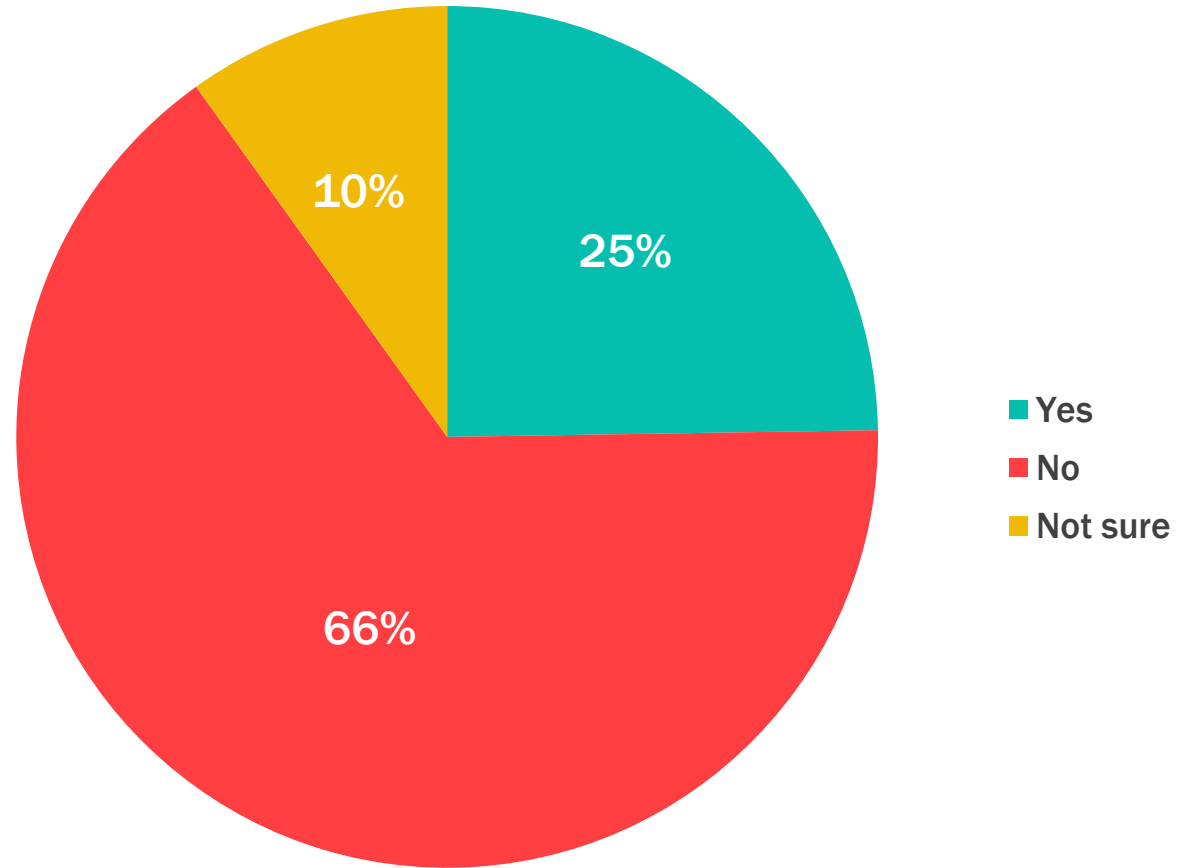


To what extent do you agree or disagree with the following statements?

# Only 1 in 4 have heard the term, “ultraprocessed foods”

Men, those earning \$80K+, white people, those under 45 and those with college degrees were more likely to report having heard of this term

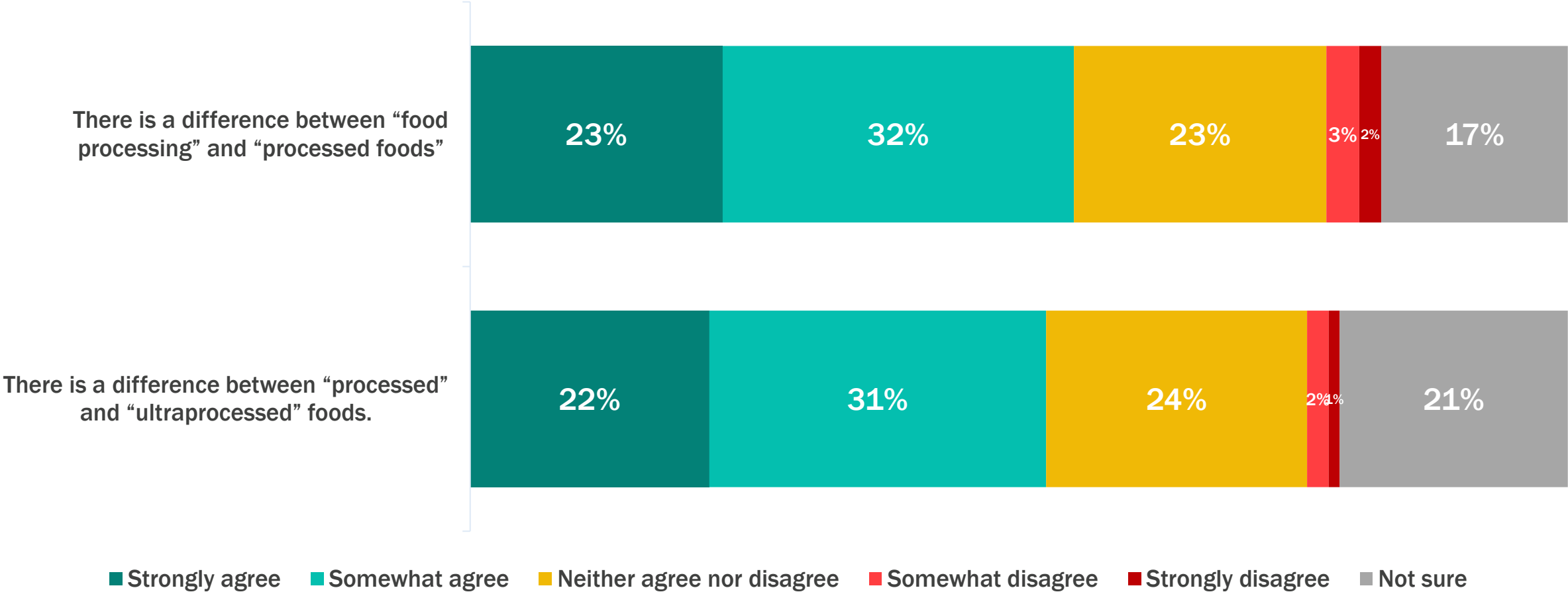
Women, those earning less than \$40K, those over age 45 and those without college degrees were more likely to say they have not heard of this term



Have you ever heard of the term, “ultraprocessed foods”?



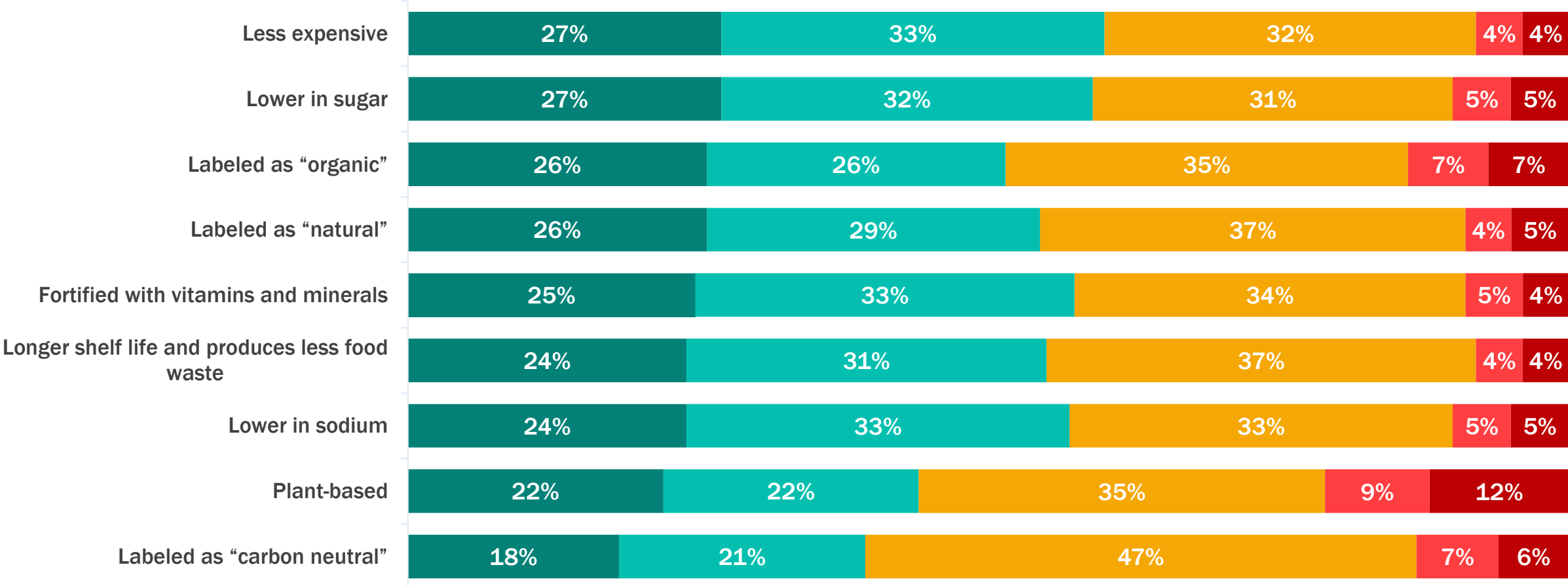
# Over half agree that there is a difference between “processed and “ultraprocessed,” but 1 in 5 are unsure



To what extent do you agree or disagree with the following statements?

# Consumers would be more likely to buy a processed food if it was cost effective, provided health/nutrition benefits, or had sought-after labels

*If you knew that a processed food had the following attributes, how would this impact your decision to buy it?*



■ Significantly more likely to buy the processed food
 ■ Somewhat more likely to buy the processed food
 ■ This would not change my opinion
 ■ Somewhat less likely to buy the processed food
 ■ Significantly less likely to buy the processed food



# Appendix

## How would you describe your level of understanding of processed foods?

	I can easily explain what processed foods are and identify examples of processed foods	I can only somewhat explain what processed foods are, but I can easily identify examples of processed foods	I cannot really explain what processed foods are, but I can identify some examples of processed foods	I can neither explain what processed foods are nor identify examples of processed foods	Not sure
Total	46%	29%	12%	5%	9%
Men	57% ↑	25% ↓	10%	3% ↓	6% ↓
Women	35% ↓	32%	14%	8% ↑	11% ↑
Less than \$40K	31% ↓	31%	17% ↑	9% ↑	13% ↑
\$40K-\$79K	39%	37% ↑	12%	3%	8%
\$80K+	65% ↑	22% ↓	7% ↓	2% ↓	4% ↓
White	52% ↑	27%	10%	4%	7%
African American	45%	26%	9%	7%	13%
Hispanic/ Latinx	34%	30%	18%	6%	12%
Under 45	58% ↑	22% ↓	8% ↓	5%	7%
45-64	36% ↓	33%	15%	6%	10%
65+	33% ↓	37% ↑	16%	4%	10%
Non-college	30% ↓	31%	18% ↑	8% ↑	13% ↑
College	62% ↑	27%	5% ↓	2% ↓	4% ↓

How would you decide whether a food or beverage is processed? Select all that apply.

	I look at the list of ingredients	I consider the form of the food	I look at the icons or claims on the front of the package	I look at the Nutrition Facts label	I look at if/how the food is packaged	I consider its location in the grocery store	I look at the brand name	Other	Don't know
Total	49%	46%	25%	41%	34%	26%	25%	1%	10%
Men	49%	49%	29% ↑	45%	39% ↑	31% ↑	31% ↑	1%	6% ↓
Women	49%	43%	21% ↓	38%	31% ↓	22% ↓	20% ↓	1%	14% ↑
Less than \$40K	45%	35% ↓	19% ↓	35% ↓	30%	18% ↓	23%	0%	17% ↑
\$40K-\$79K	53%	53%	23%	35%	32%	23%	13% ↓	2%	9%
\$80K+	52%	55% ↑	33% ↑	51% ↑	40% ↑	36% ↑	34% ↑	0%	5% ↓
White	52%	52% ↑	28%	43%	38%	28%	30% ↑	0%	9%
African American	44%	31% ↓	20%	37%	33%	23%	26%	0%	17%
Hispanic/ Latinx	49%	33% ↓	27%	37%	28%	21%	18%	2%	12%
Under 45	44% ↓	42% ↓	32% ↑	45%	38%	33% ↑	34% ↑	1%	7% ↓
45-64	52%	45%	16% ↓	36%	31%	22%	19% ↓	1%	15% ↑
65+	58% ↑	58% ↑	25%	41%	32%	17% ↓	15% ↓	0%	10%
Non-college	45% ↓	36% ↓	21% ↓	34% ↓	27% ↓	19% ↓	19% ↓	1%	17% ↑
College	54% ↑	57% ↑	30% ↑	49% ↑	42% ↑	33% ↑	32% ↑	0%	4% ↓

What would you say are positive aspects of processed foods, if any? Select all that apply.

	Convenience	Affordability	Shelf-life	Taste	Quality of ingredients	Nutrition	Safety	Impact on health
Total	45%	39%	38%	36%	24%	23%	20%	16%
Men	47%	42%	35%	38%	31% ↑	30% ↑	25% ↑	21% ↑
Women	44%	36%	41%	34%	17% ↓	18% ↓	15% ↓	13% ↓
Less than \$40K	42%	36%	40%	31%	14% ↓	15% ↓	14% ↓	11% ↓
\$40K-\$79K	52%	41%	47% ↑	35%	13% ↓	14% ↓	14% ↓	10% ↓
\$80K+	45%	43%	33% ↓	41% ↑	39% ↑	37% ↑	30% ↑	25% ↑
White	48%	43%	38%	38%	28% ↑	26%	22%	16%
African American	32%	36%	30%	40%	27%	27%	23%	23%
Hispanic/ Latinx	43%	39%	42%	29%	15%	17%	11%	14%
Under 45	40% ↓	39%	31% ↓	39%	34% ↑	34% ↑	30% ↑	23% ↑
45-64	51% ↑	41%	43%	35%	15% ↓	16% ↓	12% ↓	12% ↓
65+	47%	36%	47% ↑	30%	14% ↓	11% ↓	11% ↓	9% ↓
Non-college	44%	37%	39%	32%	15% ↓	15% ↓	14% ↓	12% ↓
College	47%	42%	37%	39%	33% ↑	32% ↑	26% ↑	21% ↑

What would you say are positive aspects of processed foods, if any? Select all that apply.

	Impact on food waste	Fortification or enrichment of nutrients	Portion size management	Fits dietary preferences	Impact on global food supply	Impact on environment	None
Total	16%	15%	14%	14%	13%	13%	13%
Men	19% ↑	21% ↑	15%	18% ↑	19% ↑	18% ↑	8% ↓
Women	12% ↓	10% ↓	14%	10% ↓	8% ↓	8% ↓	18% ↑
Less than \$40K	10% ↓	9% ↓	12%	8% ↓	6% ↓	5% ↓	20% ↑
\$40K-\$79K	14%	14%	12%	12%	8%	9%	12%
\$80K+	22% ↑	22% ↑	18%	21% ↑	24% ↑	23% ↑	7% ↓
White	17%	17%	16%	17% ↑	15%	15%	13%
African American	19%	18%	7%	12%	13%	18%	18%
Hispanic/ Latinx	12%	7%	12%	9%	10%	8%	15%
Under 45	20% ↑	19% ↑	15%	19% ↑	19% ↑	22% ↑	7% ↓
45-64	15%	10% ↓	12%	10%	12%	6% ↓	15%
65+	8% ↓	15%	16%	8% ↓	4% ↓	3% ↓	25% ↑
Non-college	11% ↓	8% ↓	11% ↓	11% ↓	9% ↓	6% ↓	19% ↑
College	21% ↑	22% ↑	17% ↑	17% ↑	19% ↑	20% ↑	7% ↓



What would you say are negative aspects of processed foods, if any? Select all that apply.

	Impact on health	Quality of ingredients	Nutrition	Taste	Safety	Impact on environment	Impact on food waste	Fortification or enrichment of nutrients
Total	44%	33%	31%	20%	19%	19%	18%	14%
Men	41%	31%	26% ↓	23%	21%	21%	20%	16%
Women	46%	35%	35% ↑	18%	17%	16% ↓	15%	12%
Less than \$40K	44%	32%	26% ↓	17%	12% ↓	14% ↓	13% ↓	11% ↓
\$40K-\$79K	47%	36%	38% ↑	19%	18%	20%	16%	9% ↓
\$80K+	42%	32%	32%	24% ↑	25% ↑	22%	23% ↑	21% ↑
White	44%	35%	32%	22%	18%	21%	18%	16%
African American	32%	24%	18% ↓	18%	9%	17%	23%	12%
Hispanic/ Latinx	47%	34%	36%	21%	25%	17%	16%	10%
Under 45	36% ↓	28% ↓	27%	22%	21%	23% ↑	24% ↑	15%
45-64	46%	37%	33%	17%	17%	15%	12% ↓	16%
65+	56% ↑	37%	34%	22%	16%	13% ↓	13%	9% ↓
Non-college	42%	30%	29%	16% ↓	16%	16% ↓	13% ↓	12%
College	46%	35%	33%	25% ↑	21%	22% ↑	23% ↑	17%

What would you say are negative aspects of processed foods, if any? Select all that apply.

	Impact on global food supply	Affordability	Portion size management	Shelf-life	Fits dietary preferences	Convenience	None
Total	14%	13%	11%	10%	9%	7%	18%
Men	16%	18% ↑	12%	12%	13% ↑	10% ↑	17%
Women	11% ↓	8% ↓	9%	8%	5% ↓	4% ↓	19%
Less than \$40K	11%	10%	8%	7% ↓	5% ↓	3% ↓	22% ↑
\$40K-\$79K	9%	10%	9%	7%	6%	4%	15%
\$80K+	19% ↑	18% ↑	14% ↑	15% ↑	15% ↑	12% ↑	14%
White	16%	14%	12%	12%	10%	8%	18%
African American	11%	13%	12%	11%	8%	10%	25%
Hispanic/ Latinx	15%	10%	11%	7%	8%	1% ↓	17%
Under 45	21% ↑	18% ↑	15% ↑	13% ↑	15% ↑	11% ↑	16%
45-64	6% ↓	11%	7%	7%	5% ↓	4% ↓	20%
65+	10%	5% ↓	5% ↓	8%	2% ↓	4%	18%
Non-college	11% ↓	9% ↓	10%	8% ↓	7% ↓	4% ↓	23% ↑
College	17% ↑	17% ↑	12%	12% ↑	11% ↑	10% ↑	12% ↓

To what extent do you agree or disagree with the following statements? % *Strongly agree*

	I keep shelf-stable, canned or packaged foods in my household.	If a food is made from scratch, it is healthier than the store-bought version of that food.	Adding more vitamins and minerals to foods and beverages can improve the nutritional value of today's food supply.	Fortified foods and beverages are a convenient way to consume more vitamins and minerals.	A healthy eating pattern can include processed foods.	Processed foods are helpful for preparing affordable meals.	The shelf stability of some processed foods helps me cut down on food waste.
Total	51%	40%	31%	28%	24%	30%	33%
Men	55% ↑	44% ↑	37% ↑	35% ↑	35% ↑	36% ↑	40% ↑
Women	47%	36% ↓	25% ↓	22% ↓	15% ↓	25% ↓	26% ↓
Less than \$40K	47%	36%	24% ↓	21% ↓	13% ↓	23% ↓	26% ↓
\$40K-\$79K	47%	37%	20% ↓	22%	17% ↓	23%	26%
\$80K+	57% ↑	47% ↑	44% ↑	40% ↑	40% ↑	41% ↑	43% ↑
White	57% ↑	43%	34%	31%	31% ↑	35% ↑	39% ↑
African American	49%	46%	33%	31%	27%	29%	33%
Hispanic/ Latinx	41%	36%	22%	19%	9% ↓	21%	17% ↓
Under 45	53%	45% ↑	39% ↑	37% ↑	40% ↑	39% ↑	43% ↑
45-64	49%	35% ↓	24% ↓	22% ↓	12% ↓	24% ↓	25% ↓
65+	50%	38%	23% ↓	18% ↓	11% ↓	18% ↓	22% ↓
Non-college	47% ↓	36% ↓	25% ↓	22% ↓	14% ↓	23% ↓	28% ↓
College	56% ↑	45% ↑	37% ↑	35% ↑	35% ↑	37% ↑	38% ↑

## Have you ever heard of the term, “ultraprocessed foods”?

	Yes	No	Not sure
Total	25%	66%	10%
Men	38% ↑	57% ↓	5% ↓
Women	13% ↓	73% ↑	14% ↑
Less than \$40K	9% ↓	80% ↑	11%
\$40K-\$79K	17% ↓	72%	11%
\$80K+	46% ↑	47% ↓	7%
White	30% ↑	62%	8%
African American	18%	71%	12%
Hispanic/ Latinx	13% ↓	76%	11%
Under 45	43% ↑	49% ↓	9%
45-64	11% ↓	80% ↑	10%
65+	7% ↓	81% ↑	12%
Non-college	10% ↓	79% ↑	10%
College	40% ↑	51% ↓	9%

To what extent do you agree or disagree with the following statements? % *Strongly agree*

	There is a difference between “food processing” and “processed foods”	There is a difference between “processed” and “ultraprocessed” foods.
Total	23%	22%
Men	31% ↑	31% ↑
Women	17% ↓	14% ↓
Less than \$40K	13% ↓	12% ↓
\$40K-\$79K	14% ↓	15% ↓
\$80K+	39% ↑	37% ↑
White	27%	27% ↑
African American	24%	22%
Hispanic/ Latinx	13%	12% ↓
Under 45	34% ↑	35% ↑
45-64	16% ↓	12% ↓
65+	12% ↓	10% ↓
Non-college	15% ↓	12% ↓
College	32% ↑	33% ↑

If you knew that a processed food had the following attributes, how would this impact your decision to buy it? % *Significantly more likely*

	Longer shelf life	Fortified with vitamins and minerals	Less expensive	Plant-based	Labeled as "organic"	Labeled as "natural"	Labeled as "carbon neutral"	Lower in sugar	Lower in sodium
Total	24%	25%	27%	22%	26%	26%	18%	27%	24%
Men	32% ↑	31% ↑	30%	29% ↑	33% ↑	32% ↑	28% ↑	35% ↑	30% ↑
Women	17% ↓	20% ↓	23%	15% ↓	19% ↓	19% ↓	9% ↓	21% ↓	19% ↓
Less than \$40K	17% ↓	15% ↓	23%	14% ↓	16% ↓	18% ↓	6% ↓	19% ↓	18% ↓
\$40K-\$79K	16% ↓	21%	20%	12% ↓	19%	20%	13%	23%	23%
\$80K+	35% ↑	38% ↑	34% ↑	36% ↑	40% ↑	38% ↑	33% ↑	39% ↑	32% ↑
White	28% ↑	28%	29%	26% ↑	28%	29%	24% ↑	31%	27%
African American	31%	24%	25%	21%	24%	25%	18%	27%	24%
Hispanic/Latinx	8% ↓	17%	18%	14%	23%	19%	7% ↓	16%	18%
Under 45	31% ↑	34% ↑	32% ↑	34% ↑	36% ↑	37% ↑	30% ↑	32% ↑	29% ↑
45-64	19% ↓	18% ↓	25%	15% ↓	20% ↓	19% ↓	10% ↓	24%	21%
65+	15% ↓	17% ↓	18% ↓	7% ↓	13% ↓	11% ↓	5% ↓	24%	18%
Non-college	18% ↓	18% ↓	22% ↓	12% ↓	16% ↓	18% ↓	8% ↓	20% ↓	17% ↓
College	31% ↑	33% ↑	31% ↑	33% ↑	36% ↑	34% ↑	29% ↑	35% ↑	32% ↑



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