2017 FOOD & HEALTH SURVEY
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Background


This year, the survey investigates important issues regarding consumer confusion, the food information landscape, health and diet, food components, food production, sustainability, and food safety.

Methodology

• Online survey of 1,002 Americans ages 18 to 80. March 10 to March 29, 2017. Approx 22 minutes to complete.
• Significant trend changes from the 2016 results are noted with up and down arrows.
• The results were weighted to ensure that they are reflective of the American population ages 18 to 80, as seen in the 2016 Current Population Survey. Specifically, they were weighted by age, education, gender, race/ethnicity, and region.
• The survey was conducted by Greenwald & Associates, using ResearchNow’s consumer panel.
## General Demographics

### Household Income

<table>
<thead>
<tr>
<th>Income Range</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than $35,000</td>
<td>17%</td>
</tr>
<tr>
<td>$35,000 to $49,999</td>
<td>16%</td>
</tr>
<tr>
<td>$50,000 to $74,999</td>
<td>20%</td>
</tr>
<tr>
<td>$75,000 to $99,999</td>
<td>15%</td>
</tr>
<tr>
<td>$100,000 to $149,999</td>
<td>17%</td>
</tr>
<tr>
<td>$150,000 and above</td>
<td>7%</td>
</tr>
<tr>
<td>Don't know</td>
<td>1%</td>
</tr>
<tr>
<td>Prefer not to answer</td>
<td>7%</td>
</tr>
</tbody>
</table>

### Education

<table>
<thead>
<tr>
<th>Education Level</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than high school</td>
<td>2%</td>
</tr>
<tr>
<td>Graduated high school</td>
<td>38%</td>
</tr>
<tr>
<td>Some college</td>
<td>19%</td>
</tr>
<tr>
<td>AA degree/technical/vocational</td>
<td>9%</td>
</tr>
<tr>
<td>Bachelor's degree</td>
<td>20%</td>
</tr>
<tr>
<td>Graduate/professional degree</td>
<td>12%</td>
</tr>
</tbody>
</table>

### Gender

<table>
<thead>
<tr>
<th>Gender</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>48%</td>
</tr>
<tr>
<td>Female</td>
<td>52%</td>
</tr>
</tbody>
</table>

### Age

<table>
<thead>
<tr>
<th>Age Range</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>18 - 34</td>
<td>31%</td>
</tr>
<tr>
<td>35 - 49</td>
<td>25%</td>
</tr>
<tr>
<td>50 - 64</td>
<td>26%</td>
</tr>
<tr>
<td>65 - 80</td>
<td>18%</td>
</tr>
</tbody>
</table>

### Race/Ethnicity

<table>
<thead>
<tr>
<th>Race/Ethnicity</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>White</td>
<td>65%</td>
</tr>
<tr>
<td>Hispanic</td>
<td>15%</td>
</tr>
<tr>
<td>African American</td>
<td>12%</td>
</tr>
<tr>
<td>Asian or Pacific Islander</td>
<td>6%</td>
</tr>
<tr>
<td>Other</td>
<td>2%</td>
</tr>
</tbody>
</table>
# Household Demographics

## U.S. region
- Northeast: 18%
- South: 37%
- West: 24%
- Midwest: 21%

## Type of location
- Suburban: 50%
- Urban: 21%
- Rural: 16%
- Small town: 13%

## Type of residence
- I own the property where I live: 66%
- I rent the property where I live: 27%
- I have another arrangement: 6%

## Marital status
- Married: 59%
- Living with partner: 7%
- Single, never married: 21%
- Divorced or separated: 9%
- Widowed: 3%
- Other: *

## Children’s ages
- Newborn - 2 years old: 8%
- 3 - 6 years old: 7%
- 7 - 12 years old: 11%
- 13 - 17 years old: 11%
- 18 or older: 38%
- Do not have any children: 39%
- Prefer not to say: 1%
Health Demographics

BMI score
- Normal or Low: 36%
- Overweight: 31%
- Obese: 30%
- No answer: 3%

Diseases
- Multiple responses accepted
- High blood pressure: 24%
- High cholesterol: 20%
- Diabetes: 11%
- Stress/anxiety/depression: 10%
- Overweight/obesity: 10%
- Heart disease: 4%
- Cancer: 2%
- Osteoporosis: 2%
- ADHD: 2%
- Stroke: 1%
- None of the above: 55%

Pregnancy
Among 18-45 females:
- Pregnant in past 12 months: 12%
- Not pregnant: 88%
"Healthy" is often at the heart of our discussions about food. Still, how we think about “healthy” in the context of what is eat remains hotly debated.
Majority see health as very good or better

While consumers may overestimate their health status, the measure has not changed from 2016

Q: How would you describe your own health, in general? (n=1,002)

**Self-Reported Health Status**

<table>
<thead>
<tr>
<th>Health Status</th>
<th>2017</th>
<th>2016</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Excellent</td>
<td>25%</td>
<td>20%</td>
<td>12%</td>
</tr>
<tr>
<td>Very good</td>
<td>25%</td>
<td>20%</td>
<td>12%</td>
</tr>
<tr>
<td>Good</td>
<td>9%</td>
<td>9%</td>
<td>13%</td>
</tr>
<tr>
<td>Fair</td>
<td>2%</td>
<td>3%</td>
<td>4%</td>
</tr>
<tr>
<td>Poor</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
</tbody>
</table>

**Health Status and BMI (% of total*)**

<table>
<thead>
<tr>
<th>Health Status</th>
<th>Normal/low</th>
<th>Overweight</th>
<th>Obese</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exc/VG</td>
<td>25%</td>
<td>20%</td>
<td>12%</td>
</tr>
<tr>
<td>Good</td>
<td>9%</td>
<td>9%</td>
<td>13%</td>
</tr>
<tr>
<td>Fair/poor</td>
<td>2%</td>
<td>3%</td>
<td>4%</td>
</tr>
</tbody>
</table>

*3% refused to answer

59%
Describe their own health as “very good” or “excellent”
‘Healthy’ largely defined as lack of problems

Having no/few health problems is tops the list, but 1 in 5 define as eating healthy

How Consumers Define ‘Healthy’

- No/few health problems
- Eating healthy
- Being fit, in good shape, not overweight
- Body functioning properly, sufficient energy
- Capable of exercise and physical activity
- Fully independent/capable/mobile
- Maintain an active/social lifestyle
- Health issues under control
- Generally happy/comfortable/optimistic
- In good mental/emotional condition
- Simply being alive, living longer
- Religion/spirituality/meditation
- Regular doctor check-ups
- Sleep well at night
- No smoking, little or no drinking alcohol
- Nothing specific mentioned

Definition by Health Status

- No/few health problems
- Eating healthy
- Being fit, in good shape, not overweight
- Body functioning properly, sufficient energy
- Capable of exercise and physical activity

Self-reported Health: Exc/VG, Good, Fair/Poor
Presence of healthy components important

Adults 50+ are more concerned about the positives than the negatives

How Consumers Define a Healthy Food

- High in healthy components or nutrients
- Free from artificial ingredients, preservatives, or additives
- Part of an important food group that I need to build a healthy eating style
- Low in unhealthy components or nutrients
- Minimally processed
- Natural
- Organic
- Non-GMO

46% of college educated say "low in unhealthy components"

Men are more likely to say "low in unhealthy components"; women are more likely to say "minimally processed"

2x Consumers in rural areas are twice as likely to choose Non-GMO

Q: How do you define a healthy food? (n=1,002)
Vitamin D, fiber, and whole grains top the list

Several components significantly increased over the last year

**Healthfulness of Specific Components**

- **Vitamin D**: Healthy (80%), Neither Healthy nor Unhealthy (10%), Unhealthy (5%), Unaware (5%)
- **Fiber**: Healthy (80%), Neither Healthy nor Unhealthy (10%), Unhealthy (5%), Unaware (5%)
- **Whole Grains**: Healthy (80%), Neither Healthy nor Unhealthy (10%), Unhealthy (5%), Unaware (5%)
- **Protein from plant sources**: Healthy (60%), Neither Healthy nor Unhealthy (30%), Unhealthy (10%), Unaware (10%)
- **Omega 3 fatty acids**: Healthy (60%), Neither Healthy nor Unhealthy (30%), Unhealthy (10%), Unaware (10%)
- **Probiotics**: Healthy (60%), Neither Healthy nor Unhealthy (30%), Unhealthy (10%), Unaware (10%)
- **Unsaturated fats**: Healthy (70%), Neither Healthy nor Unhealthy (20%), Unhealthy (10%), Unaware (10%)
- **Enriched refined grains**: Healthy (40%), Neither Healthy nor Unhealthy (40%), Unhealthy (20%), Unaware (10%)
- **Animal protein**: Healthy (40%), Neither Healthy nor Unhealthy (40%), Unhealthy (20%), Unaware (10%)
- **Fortified foods**: Healthy (40%), Neither Healthy nor Unhealthy (40%), Unhealthy (20%), Unaware (10%)
- **EPA/DHA**: Healthy (50%), Neither Healthy nor Unhealthy (20%), Unhealthy (30%), Unaware (0%)
- **Saturated fats**: Healthy (10%), Neither Healthy nor Unhealthy (50%), Unhealthy (30%), Unaware (10%)

Q: How would you rate the healthfulness of each of the following? (n=1,002)

**50%**
Of consumers age 65+ say unsaturated fats are healthy, vs. just **33%** of those age 18-34

Older consumers are also more likely to say that saturated fats are unhealthy

**47%**
Of consumers age 18-34 say animal protein is healthy, vs. just **26%** of those age 65+

Younger consumers are also more likely to say that EPA/DHA is healthy

Women are more likely to say that Vitamin D, Fiber, and Probiotics are healthy

**2017 FOOD & HEALTH SURVEY**
Factors beyond nutrition create a health halo

Form, place of purchase and length of ingredient list, among other factors, affect the perceived healthfulness of nutritionally identical products.

If Two Products Have the Same Nutrition Facts Panel... Which is Healthier?

Q: Imagine you came across two food products that had the exact same Nutrition Facts panel. Would any of the following details lead you to believe that one of the products was more likely to be healthier? (n=1,002)
Healthy eating style largely defined as the right mix

Nearly 6 in 10, an uptick in 2017, say getting the right mix of different foods is important

How Consumers Define a Healthy Eating Style

- The right mix of different food groups
- Limited or no artificial ingredients or preservatives
- Natural foods
- Can easily be incorporated into my daily routine
- Flexible and easy to maintain over time
- Eating only foods I define as healthy
- Can include higher calorie treats in moderation
- Organic foods
- Everything you eat over a long period of time
- Non-GMO foods

72% of consumers age 65+ describe a healthy eating style as the right mix of food groups. Older consumers are also more likely to think it should be part of a daily routine.

Q: How do you define a healthy eating style? (n=1,002)
Weight loss is most desired benefit

1 in 3 interested in benefit of weight loss, especially younger consumers

Q: Which of the following health benefits are you most interested in getting from foods or nutrients? (n=1,002)
Overall, Americans say they take steps to eat healthy and understand the importance of expert nutrition guidance. Many Americans also report use and familiarity with nutrition education tools, like USDA’s MyPlate.
Americans take many steps to be healthy

Common actions include drinking more water, making small changes, eating fruits/veggies

Steps Taken In Past Year

- Drink more water or other fluids to stay hydrated
- Made small changes to achieve an overall healthier diet
- Eat more fruits and vegetables
- Consume smaller portions
- Eat more foods with whole grains
- Cut calories by drinking low- and no-calorie beverages
- Balance calories to manage my weight
- Cut back on foods higher in saturated fat
- Cut back on foods higher in salt
- Compare sodium in foods like soup, bread, and frozen meals
- Cut back on full-fat dairy and replace with a low- or no-fat alternative

Women are more likely to make an effort to drink water to stay hydrated, and to consume smaller portions.

Q: Over the past year, which of the following, if any, have you made an effort to do? (n=1,002)

2017 FOOD & HEALTH SURVEY
Internal motivators drive healthy habits

Weight loss, energy, and long-term health are primary motivators for healthier eating

Q: Which of the following motivated you to make an effort to change your eating habits? Select all that apply. (Of those who made changes in the past year, n=635)

- I wanted to lose weight
- I wanted to protect my long-term health / prevent future health conditions
- I wanted to feel better and have more energy
- I wanted to prevent weight gain
- I noticed a change in my physical appearance
- I wanted to improve my health so I can have more independence in life
- I wanted to prevent any changes in my physical appearance
- I wanted to set a good example for my friends and family
- I was diagnosed with a health condition
- A conversation with my personal health care professional
- A conversation with a friend or family member
- A news article or study that discussed the effects of poor eating habits
- Other

73% Of those who are obese say they took these steps to lose weight. They are also more likely to take steps because they noticed a change in their physical appearance, wanted more independence, were diagnosed with a health condition, and had a conversation with a healthcare professional.
One in seven follow a specific eating pattern or diet

Unbranded diets like paleo, vegan and vegetarian most common

Followed a Specific Eating Pattern or Diet in Past Year

- **14% Yes**

Eating Pattern/Diet Followed

- **Unbranded diets**
- **Branded diets**
- **Fewer unhealthy foods or nutrients**
- **More healthy foods or nutrients**

Examples:

- Paleo, Vegan, Vegetarian
- Weight Watchers, Atkins, Whole 30
- Low carb, sugar, fat, sodium
- More vegetables, fruit, protein

Q: Have you followed any specific eating pattern or diet at any time in the past year? (n=1,002)

Those with lower BMI are more likely to have followed an eating pattern or diet

2017 FOOD & HEALTH SURVEY
Importance of expert guidance varies across life stages

Many agree that parents and older adults should follow advice, but believe it is less critical for adolescents, and younger adults.

Importance of Following Expert Nutrition Guidance at Specific Life Stages

Q: How important is it to follow guidance from experts on nutrition during the following stages of life? (n=1,002)
Majority use nutrition info when eating out

College educated and women are more likely to use nutrition info

Use of Nutrition Info When Eating Away From Home

Q: How, if at all, have you used nutrition information when eating away from home? (n=1,002)

73% of college educated consumers use nutrition info when eating out, vs. 51% of those with less than a college degree

62% of women use nutrition info when eating out, vs. 53% of men

58% Use nutrition info at least sometimes when eating away from home

2017 FOOD & HEALTH SURVEY
Most consumers have seen MyPlate

Nearly half know a lot or a fair about about the MyPlate graphic

Familiarity with the MyPlate Graphic

Q: How familiar are you, if at all, with the following graphic? (n=1,002)

- I have seen it and know a lot about it
- I have seen it and know a fair amount about it
- I have seen it but know very little about it
- I have never seen it before
- Not sure

Most consumers have seen MyPlate

Nearly half know a lot or a fair about about the MyPlate graphic

2017 FOOD & HEALTH SURVEY
Consumers most commonly see MyPlate at doctor’s office and schools

Nearly 3 in 10 have seen MyPlate in these locations, although this is naturally dependent on age.

**Where Consumers Have Seen the MyPlate Graphic**
(Of those familiar with graphic)

Q: Where have you seen the following graphic? (Of those familiar with MyPlate graphic, n=683)

- Personal healthcare professional’s office
- School
- Grocery store or market
- On a food package
- Registered Dietitian Nutritionist’s office
- Gym
- Community Center
- Website
- Senior Center
- Other
- Not sure

[Chart showing the percentage of consumers who have seen MyPlate graphic in each location, varying by age group from 18 to 34, 35 to 49, 50 to 64, and 65 to 80.]

**Age**
- 18 to 34
- 35 to 49
- 50 to 64
- 65 to 80

2017 FOOD & HEALTH SURVEY
FOOD CONFUSION

Americans turn to friends and family to help us guide our food choices but see others, like dietitians and healthcare professionals, as the most trusted sources. The disconnect between trust and reliance of sources may lead to the glut of conflicting nutrition information.
High trust in dietitians and health professionals

Two-thirds have high trust in advice from a conversation with a Registered Dietitian Nutritionist

**Trusted Sources About Which Foods to Eat/Avoid**

- Conversation with Registered Dietitian Nutritionist: 5 - A lot (20%), 4 (20%), 3 (20%), 2 (20%), 1 - Not at all (20%)
- Conversation with Personal Healthcare Professional: 5 - A lot (15%), 4 (15%), 3 (15%), 2 (15%), 1 - Not at all (15%)
- Conversation with wellness counselor or health coach: 5 - A lot (10%), 4 (10%), 3 (10%), 2 (10%), 1 - Not at all (10%)
- Reading a Scientific Study: 5 - A lot (10%), 4 (10%), 3 (10%), 2 (10%), 1 - Not at all (10%)
- Conversation with fitness professional: 5 - A lot (15%), 4 (15%), 3 (15%), 2 (15%), 1 - Not at all (15%)
- Health-focused website: 5 - A lot (15%), 4 (15%), 3 (15%), 2 (15%), 1 - Not at all (15%)
- Registered Dietitian Nutritionist on TV or social media: 5 - A lot (15%), 4 (15%), 3 (15%), 2 (15%), 1 - Not at all (15%)
- Friend or family member: 5 - A lot (10%), 4 (10%), 3 (10%), 2 (10%), 1 - Not at all (10%)
- Healthcare Professional on TV or via social media: 5 - A lot (15%), 4 (15%), 3 (15%), 2 (15%), 1 - Not at all (15%)
- Health, food or nutrition bloggers: 5 - A lot (10%), 4 (10%), 3 (10%), 2 (10%), 1 - Not at all (10%)
- Government Agency: 5 - A lot (15%), 4 (15%), 3 (15%), 2 (15%), 1 - Not at all (15%)
- News Article or Headline: 5 - A lot (15%), 4 (15%), 3 (15%), 2 (15%), 1 - Not at all (15%)
- Fitness Professional on TV or social media: 5 - A lot (15%), 4 (15%), 3 (15%), 2 (15%), 1 - Not at all (15%)
- A food company or manufacturer: 5 - A lot (15%), 4 (15%), 3 (15%), 2 (15%), 1 - Not at all (15%)

Q: How much would you trust information from the following on which foods to eat and avoid? (n=1,002)

- Women have greater trust in RDNs and in fitness professionals. Men have more trust in friends and family.
- Millennials have more trust in scientific studies, health websites, bloggers, the news, healthcare and fitness professionals on TV/social media, and food companies.
Healthcare professionals are top source

Friends and family are also heavily relied upon, even more than dietitians

Q: How often do you get information from the following on which foods to eat and avoid? (n=1,002)

Men are more likely to get information from friends/family, wellness counselors, healthcare professionals on TV/social media, and food companies

38% Of Millennials say friends and family are a top source of information, vs. 21% of Boomers

Millennials are also more likely to get info from many other sources
One in seven follow specific eating pattern or diets

Unbranded diets like paleo, vegan and vegetarian most common

Followed a Specific Eating Pattern or Diet in Past Year

14% Yes

Eating Pattern/Diet Followed

- Unbranded diets
- Branded diets
- Fewer unhealthy foods or nutrients
- More healthy foods or nutrients

Examples:

- Paleo, Vegan, Vegetarian
- Weight Watchers, Atkins, Whole 30
- Low carb, sugar, fat, sodium
- More vegetables, fruit, protein

Those with lower BMI are more likely to have followed an eating pattern or diet

Q: Have you followed any specific eating pattern or diet at any time in the past year? (n=1,002)
Top Influence on Decision to Follow a Specific Eating Pattern or Diet
(Of those following an eating pattern/diet)

1 in 3
Selected an eating pattern or diet based on info from friends or family

Q: Which of the following information sources most influenced your decision to choose this eating pattern or diet? (Of those following a diet, n=150)
Friends and family drive sweetener opinion

One-third say a friend or family member influenced their decision; 1 in 7 say healthcare pros

Opinion Change About Low/No-Calorie Sweeteners

More positive: 14%
More negative: 22%
No change: 14%
Not sure: 22%

Q: Thinking about the past year, how has your opinion changed, if at all, about low/no-calorie sweeteners? (n=1,002)

Q: What one source has altered your opinion the most on low/no-calorie sweeteners? (Positive opinion change, n=96; Negative opinion change, n=220)
News, friends and family drive negative opinion on added sugar

Healthcare professionals, registered dietitians among those driving more positive opinion change

Opinion Change About Added Sugars

Q: Thinking about the past year, how has your opinion changed, if at all, about added sugars? (n=1,002)

Q: What one source has altered your opinion the most on added sugars? (Positive opinion change, n=74; Negative opinion change, n=336)

Top Source of Opinion Change

2017 FOOD & HEALTH SURVEY
# News, family and friends influence safety concerns

*These are top sources for all concerns, except GMOs (scientific study)*

## Top Source of Influence on Opinion about Top Safety Concern

<table>
<thead>
<tr>
<th>Top Concern</th>
<th>#1 Source</th>
<th>#2 Source</th>
<th>#3 Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>Foodborne illness</td>
<td>News article or headline</td>
<td>Friend or family</td>
<td>Government agency</td>
</tr>
<tr>
<td>Carcinogens</td>
<td>News article or headline</td>
<td>Reading a scientific study</td>
<td>Friend or family</td>
</tr>
<tr>
<td>Chemicals in food</td>
<td>News article or headline</td>
<td>Friend or family</td>
<td>Reading a scientific study</td>
</tr>
<tr>
<td>Pesticides</td>
<td>News article or headline</td>
<td>Friend or family</td>
<td>Reading a scientific study</td>
</tr>
<tr>
<td>Food additives/ingredients</td>
<td>Friend or family</td>
<td>News article or headline</td>
<td>Reading a scientific study</td>
</tr>
<tr>
<td>Animal antibiotics</td>
<td>News article or headline</td>
<td>Friend or family</td>
<td>Reading a scientific study</td>
</tr>
<tr>
<td>Biotech/GMOs</td>
<td>Reading a scientific study</td>
<td>News article or headline</td>
<td>Wellness counselor</td>
</tr>
<tr>
<td>Allergens</td>
<td>Friend or family</td>
<td>Personal health prof.</td>
<td>Government agency</td>
</tr>
</tbody>
</table>

Q: What one source of information most influenced your opinion on [your top safety concern]? (n=1,002)
Americans partially rely on sources they don’t trust

Friends and family low trust but are a common source

Q: How much would you trust information from the following on which foods to eat and avoid? (n=1,002)
Q: How often do you get information from the following on which foods to eat and avoid? (n=1,002)

2017 FOOD & HEALTH SURVEY
Conflicting Advice Abounds
8 in 10 find conflicting advice about what to eat or avoid, many doubt their food choices

Q: Do you agree or disagree with the following statements?

“There is a lot of conflicting information about what foods I should eat or avoid.” (n=1,002)

“The conflicting information about what I should be eating makes me doubt the choices I make.” (Of those who think there is conflicting information, n=775)
Many Americans want health benefits from food but struggle to understand which foods are associated with specific benefits. This disconnect may be fueled, at least in part, by the abundance of conflicting nutrition information.
Fewer than half link most desired benefit with foods

After indicating what benefit they would most like from food, many can’t name a specific source

<table>
<thead>
<tr>
<th>Top 4 Desired Health Benefits</th>
<th>% Could Not Name a Food/Nutrient</th>
</tr>
</thead>
<tbody>
<tr>
<td>Weight Management</td>
<td>60%</td>
</tr>
<tr>
<td>Cardiovascular Health</td>
<td>49%</td>
</tr>
<tr>
<td>Increased Energy</td>
<td>57%</td>
</tr>
<tr>
<td>Digestive Health</td>
<td>50%</td>
</tr>
</tbody>
</table>

Q: Can you name a food or nutrient that you would seek out to help with this health benefit? (Of those who named a desired benefit, n=964)
Fewer than 1 in 5 are sure of their caffeine intake

Nearly half don’t know whether naturally-occurring and added caffeine have same effect

Knows the Amount of Caffeine in Foods and Beverages Consumed
(Of those who consume caffeine)

<table>
<thead>
<tr>
<th></th>
<th>2017</th>
<th>2016</th>
<th>2015</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strongly agree</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Somewhat agree</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Somewhat disagree</td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Strongly disagree</td>
<td></td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th></th>
<th>2017</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>True</td>
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<tr>
<td>False</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Not sure</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Q: 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=943)

Q: 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=1,002)
Factors beyond nutrition create a health halo

Form, place of purchase and length of ingredient list, among other factors, affect the perceived healthfulness of nutritionally identical products.

If Two Products Have the Same Nutrition Facts Panel… Which is Healthier?

Q: Imagine you came across two food products that had the exact same Nutrition Facts panel. Would any of the following details lead you to believe that one of the products was more likely to be healthier? (n=1,002)

---

**Nutrition Facts**

- 8 servings per container
- Serving size: 1 cup (85g)

**Amount per serving**

<table>
<thead>
<tr>
<th>Nutrient</th>
<th>% Daily Value*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Calories</td>
<td>125</td>
</tr>
<tr>
<td>Total Fat</td>
<td>8g</td>
</tr>
<tr>
<td>Saturated Fat</td>
<td>1g</td>
</tr>
<tr>
<td>Trans Fat</td>
<td>0g</td>
</tr>
<tr>
<td>Cholesterol</td>
<td>0mg</td>
</tr>
<tr>
<td>Sodium</td>
<td>160mg</td>
</tr>
<tr>
<td>Total Carbohydrate</td>
<td>37g</td>
</tr>
<tr>
<td>Dietary Fiber</td>
<td>4g</td>
</tr>
<tr>
<td>Total Sugars</td>
<td>12g</td>
</tr>
<tr>
<td>Added Sugars</td>
<td>2g</td>
</tr>
<tr>
<td>Protein</td>
<td>3g</td>
</tr>
<tr>
<td>Vitamin D</td>
<td>2mcg</td>
</tr>
<tr>
<td>Calcium</td>
<td>200mg</td>
</tr>
<tr>
<td>Iron</td>
<td>8mg</td>
</tr>
<tr>
<td>Potassium</td>
<td>180mg</td>
</tr>
</tbody>
</table>

---

* The % Daily Value (DV) tells you how much a nutrient in a serving of food contributes to a daily diet. 2,000 calories a day is used for general nutrition advice.

---

Q: Imagine you came across two food products that had the exact same Nutrition Facts panel. Would any of the following details lead you to believe that one of the products was more likely to be healthier? (n=1,002)

---

2017 FOOD & HEALTH SURVEY
FOOD CONFUSION: SPLIT ON SWEETENERS

The abundance of conflicting nutrition information leads to divided perceptions of sweeteners. Opinions on both low-calorie sweeteners and added sugars have grown more polarized in the past year, with friends and family driving these opinions.
More consumers link sugars to weight gain

One-third of Americans, up from 25% in 2016, say sugars are most likely to cause weight gain

Source of Calories Most Likely to Cause Weight Gain

2012 2013 2014 2015 2016 2017

Up from 25% in 2016. Monitor trend towards sugar=wt gain vs fat=wt gain

Sugars
Carbohydrates
Fats
Protein
All sources same
Not sure

Q: What source of calories is the most likely to cause weight gain? (n=1,002)
Majority are trying to avoid/limit sugars

Replacing beverages with water, eliminating certain foods are top ways consumers limit sugars

Trying to Avoid/Limit Sugars?

- Yes, avoid: 11%
- Yes, limit: 65%
- No: 76%

91%
Of those who regularly use nutrition info to decide where to eat out say they are trying to avoid or limit sugars

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

- Drinking water instead of caloric beverages
- Eliminating certain foods and beverages from my diet
- No longer adding table sugar to foods and beverages
- Using the Nutrition Facts label to choose foods and beverages with less sugar
- Consume smaller portions
- Using low-calorie sweeteners instead of adding sugar
- Ordering or purchasing “sugar-free” options when available
- Reducing the number of calories I consume each day
- Switching from full-calorie beverages to low- and no-calorie options
- Reducing fruit intake
- None of the above

Q: Are you trying to limit or avoid sugars in your diet? (n=1,002)
Q: What action(s) are you taking to limit or avoid sugars? Select all that apply. (Of those avoiding/limiting sugar, n=774)
6 in 10 view added sugars negatively

Opinions about added sugars have grown increasingly polarized over the past year

Current Opinion of Added Sugars

- Very positive
- Somewhat positive
- Neutral
- Somewhat negative
- Very negative
- Not sure

Opinion Change Over Past Year

- Much more positive
- Somewhat more positive
- No change
- Somewhat more negative
- Much more negative
- Not sure

Q: What is your opinion of added sugars? (n=1,002)

Q: Thinking about the past year, how has your opinion changed, if at all, about added sugars? (n=1,002)
Split on low-calorie sweeteners

Half who prefer sugar do so because of belief that alternative is not good for you

More Likely to Use to Sweeten A Food or Beverage

- 32% for Low/No-calorie sweeteners
- 30% for Sugar
- 38% for Do not use either

Why Consumers Prefer Sugar or Low/No-Calorie Sweeteners

- Try to avoid the alternative
- Calorie content
- Believe alternative is not good for you
- Prefer the sweetness
- Prefer the taste
- Habit
- Other
- No specific reason

Q: Which of the following are you more likely to use to sweeten foods and/or beverages? (n=1,002)

Q: Why? Select all that apply. (Of those who prefer sugar, n=378; Of those who prefer low/no-calorie sweeteners, n=301)

55%

Of those who have a non-communicable disease prefer low/no-calorie sweeteners

2017 FOOD & HEALTH SURVEY
Sweeteners sought after to specific benefits

Half or more who prefer sweeteners say they help with sugar/calorie consumption, weight

What Do Low/No-Calorie Sweeteners Help With?
(Of Those Who Prefer Them Over Sugar)

- Consume less sugar: 63%
- Consume fewer total calories: 50%
- Lose weight: 51%
- Maintain my weight: 44%
- Consume an appropriate amount of total calories: 36%
- Consume an appropriate amount of sugar: 25%
- Other: 15%
- None of the above: 2%

Q: Which of the following, if any, do you believe consuming low/no-calorie sweeteners helps you do? Select all that apply. (Of those who prefer low/no-calorie sweeteners, n=301)
1 in 5 have positive opinion of low-calorie sweeteners

Like added sugars, opinions about sweeteners have become increasingly polarized

Current Opinion of Low/No-Calorie Sweeteners

- Very positive
- Somewhat positive
- Neutral
- Somewhat negative
- Very negative
- Not sure

Opinion Change Over Past Year

- Much more positive
- Somewhat more positive
- No change
- Somewhat more negative
- Much more negative
- Not sure

Of those with a very positive opinion about sweeteners, over half say they have a more positive opinion than one year ago.

Q: What is your opinion of low/no-calorie sweeteners? (n=1,002)
Q: Thinking about the past year, how has your opinion changed, if at all, about low/no-calorie sweeteners? (n=1,002)
The definition of “processed foods” is arbitrary. Considerations like organic vs conventional, homemade vs store-bought and fresh vs frozen vs canned seem to all affect our individualized definition of “processed foods.”
Expiration, NFP, and ingredients are key

Similar to previous years, this packaging information is most frequently consulted when shopping

Q: How often do you consult the following packaging information before deciding to purchase a food or beverage? (n=1,002)

Packaging Information Consulted During Purchase

- Expiration date
- Nutrition facts panel
- Ingredients list
- Calorie and other nutrition information on the front of the package via an icon or graphic
- Statements about nutrition benefits
- Brand name
- Statements about health benefits

Women are more likely to consult the expiration date, NFP, ingredients list, and statements about nutrition benefits.

- 51% of Boomers say they often look at calorie/nutrition icons/graphics, vs. 36% of millennials.
- Boomers are also more likely to consult the expiration date, ingredients list, and brand name.

- 39% of lower income consumers look at statements about health benefits, vs. 26% of higher income consumers.
- Hispanic consumers are more likely to consult a variety of packaging information.

2017 FOOD & HEALTH SURVEY
Packaging functionality matters

While some consumers are unconcerned, many place high importance on packaging functionality

Q: How important are the following factors when you are purchasing a food or beverage? (n=1,002)

- **Package can be resealed and saved for later**: 50% extremely important, 40% important, 10% not at all important
- **Ease of opening the product’s packaging**: 38% extremely important, 36% important, 16% not at all important
- **Clear or see-through packaging**: 50% extremely important, 30% important, 20% not at all important
- **Individually portioned packaging**: 40% extremely important, 40% important, 20% not at all important
- **Recyclable packaging**: 40% extremely important, 30% important, 30% not at all important

**50%**
Of lower income consumers think ease of opening is highly important, vs. **34%** of higher income consumers. They also care more about see-through packaging.

**38%**
Of Boomers say see through packaging is highly important, vs. **29%** of millennials

Hispanic consumers are more likely to see all packaging factors as highly important, with the exception of re-sealable packaging.
“Processed” is defined by the consumer

Organic, home-made and form are all factors associated with perception of processed

What Do Consumers Consider to be “Processed”?

Carrot cake, store-bought
Carrot soup, boxed
Carrot baby food, store-bought
Canned carrots
Carrot juice
Carrot cake, homemade
Frozen carrots
Bagged baby carrots
Carrot soup, homemade
Carrot baby food, homemade
Organic bagged baby carrots
Organic frozen carrots
Bunch of carrots
Bag of unpeeled, raw carrots
None of the above

Q: Which of the options below would you consider to be processed foods? Select all that apply. (n=1,002)

Nearly double see bagged baby carrots as processed compared to the same product, but organic.
Consumers are interested in convenience

Convenience, time saved more important than safety, food waste for processed, packaged foods

78%

Are swayed to consume packaged foods by reasons related to making life easier:

- Convenience
- Time-saving
- Ease of preparation
- Can be consumed on the go

For processed foods, the same is true for 75% of consumers.

Q: Which of the following do you consider to be reasons why you might consume processed/packaged foods? Select all that apply. (Processed split sample, n=501; Packaged split sample, n=501)

Q: Which of the following do you consider to be reasons why you might consume processed/packaged foods? Select all that apply. (Processed split sample, n=501; Packaged split sample, n=501)
**Americans prioritize saving**

1 in 4 would spend more on groceries, over half would save or invest money

### How Consumers Would Spend an Extra $100

- **Save or invest the money**
- **Buy groceries**
- **Shop (for anything other than groceries)**
- **Spend more on entertainment**
- **Fix or update my home**
- **Have more meals at restaurants or away from home**
- **Use to care for friends and family**
- **Cover costs for medication and healthcare**
- **Purchase a gym membership or fitness class**
- **Other**

**25%**

Would prioritize buying groceries

Groups more likely
- Under age 50
- Less educated
- Lower income
- Hispanic
- Has children

---

Q: If you had an extra $100 to spend every month, what would you do with that money? Select up to 3 options. (n=1,002)

---

**2017 FOOD & HEALTH SURVEY**
Americans prioritize time with friends and family

Changes in meal habits, either cooking more or eating out, are not top priorities

How Consumers Would Spend an Extra 4 Hours

Q: If you had an extra 4 hours every week, how would you likely spend that time? Select up to 3 options. (n=1,002)
Supermarkets dominate food shopping locations

Super-stores also dominate; natural food, convenience and drug stores are less common

Where Consumers Shop for Food/Beverages

Frequent Shopping Locations by Income

% Always/Often (4-5 of 5)

Q: How often do you shop for food and beverages at the following? (n=1,002)
Taste, price, healthfulness reign supreme

Convenience relatively steady with half of consumers stating it as a top driver

84% of consumers say taste is a top (4-5 of 5) driver of purchases. Only 35% say the same for brand.
Same factors dominate in 2017

Taste, price, healthfulness are top factors; brand was added this year

Drivers of Food/Beverage Purchases

Q: How much of an impact do the following have on your decision to buy foods and beverages? (n=1,002)

Women are more likely to say that taste, healthfulness, and sustainability matter

55% of Millennials say convenience is a top driver

Boomers are more likely to say taste and brand matter

Lower income consumers care more about all factors except for healthfulness and brand

Taste, price, healthfulness are top factors; brand was added this year
THINKING BEYOND THE BOX

When it comes to what Americans' eat and why, considerations go far beyond the factors that traditionally drive purchases - taste, price and convenience. How food is produced, where it comes from, and perceived corporate values have a big impact on food decisions.


Sustainability important for half of consumers

Pesticide use and conserving natural habitat are top concerns related to sustainability

Importance of Food Being Produced in a Sustainable Way

Most Important Aspects of Sustainability
(For Those Who See Sustainability as Important)

Reducing the amount of pesticides used to produce food
Conserving the natural habitat
Conserving farmland over multiple generations
Less food and energy waste
Fewer food miles
Ensuring a sufficient food supply for the growing global population
Ensuring an affordable food supply
Producing more food with less use of natural resources

56% of women care about food being produced in a sustainable way, vs. 42% of men.

Q: How important is it to you that the food products you purchase or consume are produced in a sustainable way? (n=1,002)
Q: What 3 aspects of producing food in a sustainable way are most important to you? (Sustainability is important, n=527)
Labels impact product and restaurant choice

“No added hormones” most impactful for products; “natural” most impactful for restaurant choice

Labels Consumers Regularly Seek on Packages/at Restaurants

- No added hormones or steroids
- Natural
- Raised without antibiotics
- Pesticide-free
- Non-GMO
- Organic
- Locally-sourced
- Sustainably-sourced
- None of the above

Buy foods and beverages because they are advertised on the label as...

Eat at restaurants because they advertised their foods and beverages as...

Natural/Organic Labels by Generation

- Natural (product)
- Natural (restaurant)
- Organic (product)
- Organic (restaurant)

Self-reported Health: Millennial, Gen X, Boomer

Q: Which of the following, if any, do you do on a regular basis? Select all that apply.
Buy foods and beverages because they are advertised on the label as... (Split sample, n=501); Eat at restaurants because they advertised their foods and beverages as... (Split sample, n=501)
Food production, values impact purchases

A third of consumers say it is highly important to know that a company shares their values

Production-Related Purchase Factors

Q: How important are the following factors in your decision to purchase a food or beverage? (n=1,002)

- Recognizing the ingredients listed on the package
- Knowing where the food comes from
- The number of ingredients on the food’s label
- Understanding how the food is produced
- Knowing that the manufacturer shares my values
- Knowing that the manufacturer has a commitment to reducing food waste

Women are more likely to care about recognizing ingredients, knowing where food comes from, the number of ingredients, and how food is produced.

68% Of Boomers say that recognizing ingredients listed is important, vs. 54% of Millennials.

52% Of lower-income consumers say the number of ingredients listed is important, vs. 40% of higher-income consumers.

2017 FOOD & HEALTH SURVEY
Q: You mentioned that you prefer to buy foods and beverages that are produced by companies that share your values. What values are you thinking about specifically? (Cares about shared values, n=654)
Imagine you are going to the store to purchase a food or beverage you like, and you see two different options:

- **Option A** has artificial ingredients like it always has, and you know it tastes great.
- **Option B** has no artificial ingredients, and you know it tastes about half as good as Option A.

The two options are the same in all other ways. **Which would you choose?**

Q: Imagine you are going to the store to purchase a food or beverage you like, and you see two different options: Option A has artificial ingredients like it always has, and you know it tastes great. Option B has no artificial ingredients, and you know it tastes about half as good as Option A. The two options are the same in all other ways. Which would you choose? (n=1,002)
Several factors impact restaurant choice

*About 4 in 10 say knowing where food comes from, natural ingredients, and production important*

**Factors When Choosing Where to Eat Out**

- **Knowing where the food comes from**
- **Knowing that the food contains only natural ingredients**
- **Understanding how the food is produced**
- **Knowing that the restaurant has a commitment to reducing food waste**
- **Availability of organic options**

Q: How important are the following factors when it comes to choosing a restaurant or cafeteria? (Split sample, n=503)

- **Women care more about all issues, except the availability of organic options**
- **60%** Of those who regularly use nutrition info when eating out say it is important to know that the food contains only natural ingredients.
- **This group unsurprisingly cares more about all of these factors**
- **49%** Of those with children say it is important to know where food comes from when eating out, vs. **37%** of those without kids.

2017 FOOD & HEALTH SURVEY
Americans’ food values are also reflected in their perceptions of the food supply and their food safety concerns.
Confidence in food supply down slightly

*Foodborne illness remains top safety concern, but concern about carcinogens on the rise*

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

- **Very confident**
- **Somewhat confident**
- **Not too confident**
- **Not at all confident**
- **Not sure**

### Most Important Food Safety Issues Today

- **Foodborne illness from bacteria**
- **Carcinogens or cancer-causing chemicals in food**
- **Chemicals in food**
- **Pesticides / pesticide residues**
- **Food additives and ingredients**
- **Animal antibiotics**
- **Biotechnology / GMOs**
- **The presence of allergens in food**
- **Other**

#### 2017 FOOD & HEALTH SURVEY

- **35%** Of Millennials are not confident, vs. **24%** of Boomers

- **56%** Of those who say there is a lot of conflicting information about what foods to eat/avoid say carcinogens is a top 3 issue, vs. **45%** of those who do not see conflicting info
Food safety concerns alter eating habits

Foodborne illness and carcinogens driving changed eating habits

Q: Have you changed your eating habits due to concerns about [your top safety concern]? (n=1,002)

- 43% Yes

Changed Eating Habits Due to Concerns about Top Safety Issue

- 58% Of those not confident in the food supply made a change because of a safety issue, vs. 38% of those who are confident
- 55% Of those with a high level of trust in the news made a change because of a safety issue, vs. 36% of those with low trust

Changed Habits by the Concern Driving the Change

- Foodborne illness from bacteria
- Carcinogens or cancer-causing chemicals in food
- Chemicals in food
- Pesticides / pesticide residues
- Food additives and ingredients
- Animal antibiotics
- Biotechnology / “GMO”s
- The presence of allergens in food

2017 FOOD & HEALTH SURVEY
News, family and friends influence safety concerns

*These are top sources for all concerns, except GMOs (scientific study)*

<table>
<thead>
<tr>
<th>Top Source of Influence on Opinion about Top Safety Concern</th>
<th>Top Concern</th>
<th>#1 Source</th>
<th>#2 Source</th>
<th>#3 Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>News Article or Headline</td>
<td>Foodborne illness</td>
<td>News article or headline 36%</td>
<td>Friend or family 17%</td>
<td>Government agency 8%</td>
</tr>
<tr>
<td>Friend or family member</td>
<td>Carcinogens</td>
<td>News article or headline 31%</td>
<td>Reading a scientific study 17%</td>
<td>Friend or family 13%</td>
</tr>
<tr>
<td>Reading a Scientific Study</td>
<td>Chemicals in food</td>
<td>News article or headline 24%</td>
<td>Friend or family 20%</td>
<td>Reading a scientific study 10%</td>
</tr>
<tr>
<td>Government Agency</td>
<td>Pesticides</td>
<td>News article or headline 22%</td>
<td>Friend or family 18%</td>
<td>Reading a scientific study 11%</td>
</tr>
<tr>
<td>Conversation with Personal Healthcare Professional</td>
<td>Food additives/ingredients</td>
<td>Friend or family 21%</td>
<td>News article or headline 17%</td>
<td>Reading a scientific study 15%</td>
</tr>
<tr>
<td>Healthcare Professional on TV or via social media</td>
<td>Animal antibiotics</td>
<td>News article or headline 18%</td>
<td>Friend or family 18%</td>
<td>Reading a scientific study 13%</td>
</tr>
<tr>
<td>Health-focused website</td>
<td>Biotech/GMOs</td>
<td>Reading a scientific study 25%</td>
<td>News article or headline 21%</td>
<td>Wellness counselor 11%</td>
</tr>
<tr>
<td>A food company or manufacturer</td>
<td>Allergens</td>
<td>Friend or family 24%</td>
<td>Personal health prof. 14%</td>
<td>Government agency 9%</td>
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<tr>
<td>Conversation with Registered Dietitian Nutritionist</td>
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<tr>
<td>Conversation with wellness counselor or health coach</td>
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<tr>
<td>Fitness Professional on TV or social media</td>
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<tr>
<td>Registered Dietitian Nutritionist on TV or social media</td>
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<tr>
<td>Conversation with fitness professional</td>
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</tbody>
</table>

Q: What one source of information most influenced your opinion on [your top safety concern]? (n=1,002)
Healthfulness and safety top GMO concerns

1 in 5 who seek non-GMO labels say they don’t have enough information on GMO foods

Why Some Consumers Seek Non-GMO Labels
(Of those who seek on products or when eating out)

- Non-GMO foods are healthier than conventional foods
- Non-GMO foods are safer than conventional foods
- I prefer to eat organic foods
- Non-GMO foods are better for the environment than conventional foods
- I don’t have enough information on GMO foods
- I am unsure about GMO foods
- Other

73% Seek non-GMO labels because they believe these foods are either healthier, safer, or better for the environment

Q: Which of the following are reasons why you choose to purchase foods that are labeled as “Non-GMO”? Select all that apply. (Buys food or eats at restaurants that are non-GMO, n=207)
Knowledge of FDA’s antibiotic rule increases confidence

Nearly half report increase in confidence for responsible use, and purchasing animal products

Change in Confidence Due to FDA Prohibition of Growth-Promotion Uses of Antibiotics

- Change in confidence that vets/farmers are using antibiotics responsibly
- Change in confidence about purchasing animal products

43%

Of those who are not confident about the U.S. food supply say that this change makes them more confident antibiotics are being used responsibly and 38% are more confident about purchasing animal products

Q: The US Food and Drug Administration recently prohibited growth-promotion uses of antibiotics and now only allows antibiotics to fight illness in animals producing food...
How does this change impact your level of confidence that veterinarians and farmers are using antibiotics responsibly? (n=1,002)
How does this change impact your level of confidence in purchasing meat, poultry, egg, and milk products? (n=1,002)

2017 FOOD & HEALTH SURVEY
For more information on the
2017 Food and Health Survey
visit foodinsight.org/FHS
2017 FOOD & HEALTH SURVEY