Consumer Food Values, Trends, Attitudes and Drivers

A Presentation to the Ag Outlook Forum
February 22, 2019
Alexandra Lewin-Zwerdling, PhD, MPA
International Food Information Council Foundation
Q8: Do you agree or disagree with the following statement? “There is a lot of conflicting information about what foods I should eat or avoid.” (n=1,009)

Q9: Do you agree or disagree with the following statement? “The conflicting information about what I should be eating makes me doubt the choices I make.” (Of those who agree about conflicting information, n= 817)
Consumers Put Trust in Health Professionals

Trust in Government agencies has increased significantly since 2017, going from 25% highly trust to 38%

Q10: How much would you trust information from the following on which foods to eat and avoid? (n=1,009)

1In 2017, this item did not include the examples in parentheses
2In 2017, this item was phrased as “Healthcare professional on TV or via social media”
3In 2017, this item was phrased as “News Article or Headline”

76%
Of older Americans (those 65+) trust a registered dietitian, compared to 65% of younger adults (<35 years old)
Younger adults also have more trust in technology-based sources of information, including fitness apps, bloggers and people on TV
Consumers Use Multiple Sources for Information

Consumers who rate food sustainability as very important generally indicated using more sources

Sources for Information About Which Foods to Eat/Avoid

Q11: How often do you get information from the following on which foods to eat and avoid? (n=1,009)

1. Conversation with personal healthcare professional
2. Friend or family member
3. News article or headline, or news on TV³
4. Conversation with registered dietitian nutritionist
5. Health-focused website
6. Reading a scientific study
7. Doctor or nutritionist on TV or via social media²
8. Conversation with wellness counselor or health coach
9. Conversation with fitness professional
10. Government agency (USDA, EPA, FDA, or CDC)¹
11. Fitness, diet or nutrition mobile app
12. Health, food or nutrition bloggers
13. A food company or manufacturer
14. Chef or culinary professional

Consumers at a lower BMI are more likely to listen to friends, personal healthcare professional and health coaches
Relationship Between Trust and Reliance

Health professionals trusted and used by consumers to guide health and food decisions

Level of Trust vs. Reliance as a Source

Degree of Trust (% 4-5 out of 5)

High Trust, Uncommon Source

Low Trust, Uncommon Source

Reliance as Source (% 4-5 out of 5)

High Trust, Common Source

Low Trust, Common Source

RDN

Wellness Counselor or Health Coach

Fitness Prof.

Scientific Study

Government Agency

Chef or Culinary Professional

Apps

Blogger

Food Company

Dr./RDN on TV/Social Media

Health-Focused Website

News Article/Headline/TV

Friends/Family

FoodInsight.org
Taste and Price Remain Top Drivers

Although price is a top driver, it again comes in at a lower level than was seen before 2017

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

Q13: How much of an impact do the following have on your decision to buy foods and beverages? (n=1,009)
Familiarity is an Important Purchase Driver

Key drivers, like taste, remain unchanged from 2017

Drivers of Food/Beverage Purchases

- Taste
- Price
- Familiarity
- Healthfulness
- Convenience
- Sustainability

57% of those under 35 say familiarity is a top driver vs. roughly 7 in 10 older consumers.

Consumers who report being confused by conflicting nutrition information are more likely to be influenced by several of these factors.
# How Context Influences the Consumer

**Despite identical nutritional info, GMOs, longer ingredients lists, sustainable production and freshness influence perception**

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## If Two Products Have the Same Nutrition Facts Panel…

**Which is Healthier?**

<table>
<thead>
<tr>
<th>Context</th>
<th>Contain GMO Ingredients</th>
<th>Longer List of Ingredients</th>
<th>Tastes Sweeter</th>
<th>Produced With Newer Technology</th>
<th>Produced in More Environmentally Sustainable Way</th>
<th>Fresh Food Product</th>
<th>Contain Non-GMO Ingredients</th>
<th>Shorter List of Ingredients</th>
<th>Tastes Less Sweet</th>
<th>Not Produced With Newer Technology</th>
<th>Produced in Less Environmentally Sustainable Way</th>
<th>Frozen Food Product</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contains GMO Ingredients</td>
<td>60%</td>
<td>40%</td>
<td>20%</td>
<td></td>
<td></td>
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<tr>
<td>Longer List of Ingredients</td>
<td>60%</td>
<td>40%</td>
<td>20%</td>
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<td></td>
</tr>
<tr>
<td>Tastes Sweeter</td>
<td>60%</td>
<td>40%</td>
<td>20%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Produced With Newer Technology</td>
<td>60%</td>
<td>40%</td>
<td>20%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Produced in More Environmentally Sustainable Way</td>
<td>60%</td>
<td>40%</td>
<td>20%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fresh Food Product</td>
<td>60%</td>
<td>40%</td>
<td>20%</td>
<td></td>
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</tbody>
</table>

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Q18: 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=1,009)
Recognizing the ingredients listed on the package
Knowing where the food comes from
Understanding how the food is produced
Being able to access information about how my food is produced
The number of ingredients on the food’s label
Knowing that the manufacturer has a commitment to producing food in an environmentally sustainable way
Knowing that the food was produced with animal welfare in mind

Important Factors When Purchasing Food

Q43: How important are the following factors in your decision to purchase a food or beverage? (Split Sample A, n=505)

A higher percentage of women rate almost all factors as important, compared to men.

Those who see sustainability as very important rank each factor higher than those that do not.
Labeling Influence on Purchasing Behavior

Consumers more influenced by labels when shopping for food than when eating away from home

Q47a: 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. (Split Sample A, n=505)

Q47b: Which of the following, if any, do you do on a regular basis (that is, most times when you eat away from home)? Eat at restaurants because they advertised their foods and beverages as...? Select all that apply. (Split Sample B, n=504)
Bioengineered Food Disclosure Survey

Consumer Perceptions and Reactions to Various Stimuli and Visuals Related to Bioengineered Foods

June 2018
Introduction

Research Objectives
- Measure consumers’ general awareness and understanding of genetically modified / bioengineered foods, and how consumers currently react to these food products when grocery shopping.
- Understand how consumers’ attitudes and perceptions vary when viewing different methods of expressing the presence of bioengineered ingredients in food products. Measure reactions to both visual (logo) and textual formats.

Sampling
- Research Now Online Panel
- Sample size
  - 1002 total US respondents
  - Representative distribution by region, gender, age, education, race / ethnicity and household income

Methodology
- Survey Conducted
  - May 18-27, 2018
- Average Length of Online Survey
  - 15 minutes
- Qualification Criteria
  - Age 18-80
  - Sole or shared responsibility for household’s grocery shopping
The same percent of consumers that know very little or nothing at all (36%) say they know a great deal or fair amount (36%) about bioengineered foods. Those who claim to be the most knowledgeable about bioengineered foods tend to be young, male, parents and African-American.

Q2. How much do you know about bioengineered/genetically modified foods?
Base=Total Respondents; n=1002
Nearly half of consumers do not consider whether foods are genetically modified (47%). Two in five consumers consider the genetic modification of foods when buying them (41%). Those who consider whether or not food they intend to purchase are genetically modified tend to be young, male, parents and African-American.

Q3. Thinking back about the past twelve months, when making decisions about buying foods and beverages, did you consider whether or not they are genetically modified or bioengineered (BE)?
Base=Total Respondents; n=1002
Almost half of the surveyed consumers avoid at least somewhat genetically modified foods (47%). Slightly less do not avoid (40%). Avoiders of bioengineered foods tend to be younger, from the Northeast and West, have children at home, and are African-American.

Q4. To what extent do you try to avoid foods that have been genetically modified/bioengineered (BE)?
Base=Total Respondents; n=1002

(% Entirely + Somewhat)

<table>
<thead>
<tr>
<th>Extent Try To Avoid Genetically Modified Foods (% of Total)</th>
<th>Age</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entirely</td>
<td>59%</td>
</tr>
<tr>
<td>Somewhat</td>
<td>52%</td>
</tr>
<tr>
<td>Aware but not avoid</td>
<td>52%</td>
</tr>
<tr>
<td>Do not avoid</td>
<td>47%</td>
</tr>
<tr>
<td>Unsure</td>
<td>44%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Region &amp; Kids</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Entirely + Somewhat</td>
<td></td>
</tr>
<tr>
<td>Northeast</td>
<td>58%</td>
</tr>
<tr>
<td>Midwest</td>
<td>41%</td>
</tr>
<tr>
<td>South</td>
<td>44%</td>
</tr>
<tr>
<td>West</td>
<td>52%</td>
</tr>
<tr>
<td>Kids</td>
<td>53%</td>
</tr>
<tr>
<td>No kids</td>
<td>20%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Race</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Entirely + Somewhat</td>
<td></td>
</tr>
<tr>
<td>African-American</td>
<td>52%</td>
</tr>
<tr>
<td>Caucasian</td>
<td>48%</td>
</tr>
<tr>
<td>Hispanic/Latino</td>
<td>39%</td>
</tr>
</tbody>
</table>
Human health concerns are the primary reason consumers avoid BE foods, then concerns dip significantly. Following human health are environmental and animal health concerns.

Q5. Why do you avoid BE foods?
Base=Try to avoid foods that have been genetically modified; n=476
Uncertainty about which foods are genetically modified is the primary reason for not avoiding BE foods. Older consumers are more likely to avoid certain foods due to a lack of knowledge. A majority of respondents (53%) say they are less likely to consume food if they know it contains BE ingredients. Nearly half (47%) would either have no change or would be more likely to consume these foods.

Reasons NOT To Avoid BE Foods (% of Those Who Do Not Avoid)

- Unsure which foods contain BE ingredients: 49%
- BE foods are comparable in healthiness: 29%
- BE foods are comparable in safety: 26%
- BE foods are comparable in price: 21%
- Like specific products regardless of BE labeling: 20%
- BE foods are comparable in environmental sustainability: 18%
- Other: 3%

Unsure which Foods Contain BE Ingredients by Age (% of Those Who Do Not Avoid in Each Age Group)

- 18-24: 36%
- 25-34: 40%
- 35-44: 57%
- 45-54: 49%
- 55-65: 60%
- 66-80: 51%

Likelihood to Consume BE Foods If Knew Which Foods Contained BE Ingredients (% of Total Respondents)

- More likely: 13%
- Less likely: 53%
- No change: 34%

Q7. Why don’t you seek to avoid BE foods?
Q6. What types of BE foods do you try to avoid.
Base=Try to avoid foods that have been genetically modified; n=395; Total=1002
There is agreement about the importance of labels/claims for both yourself and your family; “all natural, 100% natural or natural” and “raised without antibiotics” are the most important claims.

<table>
<thead>
<tr>
<th>Importance of Labels or Claims</th>
<th>When Seeking Out Foods To Buy</th>
<th>(% Important + Very Important; Base=Total Respondents)</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Natural, 100% Natural or Natural</td>
<td>For yourself</td>
<td>71%</td>
</tr>
<tr>
<td></td>
<td>For your family</td>
<td>72%</td>
</tr>
<tr>
<td>Raised without Antibiotics</td>
<td>For yourself</td>
<td>71%</td>
</tr>
<tr>
<td></td>
<td>For your family</td>
<td>72%</td>
</tr>
<tr>
<td>Sustainable</td>
<td>For yourself</td>
<td>62%</td>
</tr>
<tr>
<td></td>
<td>For your family</td>
<td>63%</td>
</tr>
<tr>
<td>Locally Sourced</td>
<td>For yourself</td>
<td>61%</td>
</tr>
<tr>
<td></td>
<td>For your family</td>
<td>63%</td>
</tr>
<tr>
<td>USDA Certified Organic</td>
<td>For yourself</td>
<td>60%</td>
</tr>
<tr>
<td></td>
<td>For your family</td>
<td>60%</td>
</tr>
<tr>
<td>Not made with genetically modified ingredients</td>
<td>For yourself</td>
<td>59%</td>
</tr>
<tr>
<td></td>
<td>For your family</td>
<td>64%</td>
</tr>
<tr>
<td>Non-GMO Project Verified</td>
<td>For yourself</td>
<td>57%</td>
</tr>
<tr>
<td></td>
<td>For your family</td>
<td>58%</td>
</tr>
<tr>
<td>Fair Trade</td>
<td>For yourself</td>
<td>50%</td>
</tr>
<tr>
<td></td>
<td>For your family</td>
<td>50%</td>
</tr>
</tbody>
</table>

Q9. How important are the following labels or claims when seeking out foods to buy for yourself?
Q10. How important are the following labels or claims when seeking out foods to buy for your family?
Base=Total Respondents; n=1002
The logo-only option receives the lowest price - $2.63; while the All Natural option receives a price equal to the Control option - $2.96 - which is the highest amount.

### Most Consumer is Willing to Pay
*(Split 3 - Average Price)*

<table>
<thead>
<tr>
<th>Option</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Control</td>
<td>$2.96</td>
</tr>
<tr>
<td>Logo only</td>
<td>$2.63</td>
</tr>
<tr>
<td>All Natural</td>
<td>$2.96</td>
</tr>
<tr>
<td>Sustainable</td>
<td>$2.89</td>
</tr>
</tbody>
</table>

Only younger consumers will pay more than others for this entire series of visuals. Other segments are not substantially different from the overall average.

Q13. What is the most you would be willing to pay for the container on the right? Base=Split Respondents; n=varies; mean includes zero
Over three in five respondents say that the Bioengineered logo (65%) and May Be Bioengineered Food logo (62%) provides the right amount of information.

Due to small sample sizes, there are no significant differences by segment to these logo options.

Q16. Do these labels/text contain...?
Base=Split Respondents; n=varies
“Contains” a Bioengineered Food Ingredient (51% right amount of information) is clearly preferred over the “May Contain” statement (56% not enough information, 24% right amount of information).

For this option which shows no logos and only text, there are no significant differences in perceptions by segment.

Q16. Do these labels/text contain...?
Base=Split Respondents; n=varies
Health-focused websites would be visited by 38% of consumers that wished to learn more about BE foods.

**Where Consumer Would Look for Information about BE Foods**

(\% Selected as One of Top Three)

- **Health-focused website**: 38%
- **Reading a Scientific Study**: 29%
- **News Article or Headline**: 21%
- **Conversation with Reg Diet’n Nutritionist**: 19%
- **Health, food or nutrition bloggers**: 17%
- **Government Agency**: 17%
- **Conversation with Personal HC Prof’l**: 16%
- **A food company or manufacturer**: 15%
- **Friend or family member**: 13%
- **Healthcare Prof’l on TV/social media**: 9%
- **Reg Diet’n Nutritionist on TV/social media**: 9%
- **Conv. w/ wellness counselor/health coach**: 7%
- **Conversation with Fitness Professional**: 4%
- **Fitness Professional on TV/social media**: 4%
- **Other**: 6%

Health-focused website is ranked #1 by nearly all respondent segments. However, a health-focused websites is significantly more important to older respondents (from 39% to 46%) and women (41%) compared to other segments.

Older respondents (from 32%-35%) are also more likely to read a scientific study, along with Caucasians (34%), those more highly educated (36%) and consumers with children (32%).

Consumers with the highest income levels are most likely to read news articles (35%).

Q17. If you wanted to learn more about BE foods, where would you seek out additional information? Base=Total Respondents; n=1002

FOODINSIGHT.ORG
Consumers want BE labels on food packaging; they do not want to have to work at obtaining BE information. Either a symbol or visual representation on the food package (51% rank #1) or text on a food package (29% rank #1) are the most popular ways that consumers want to receive/view BE food ingredient information.

<table>
<thead>
<tr>
<th>Method</th>
<th>Rank 1</th>
<th>Rank 2</th>
<th>Rank 3</th>
<th>Rank 4</th>
<th>Rank 5</th>
<th>Rank 6</th>
</tr>
</thead>
<tbody>
<tr>
<td>Symbol or visual representation on a food package</td>
<td>51%</td>
<td>22%</td>
<td>8%</td>
<td>6%</td>
<td>6%</td>
<td>7%</td>
</tr>
<tr>
<td>Text on a food package</td>
<td>29%</td>
<td>34%</td>
<td>10%</td>
<td>9%</td>
<td>9%</td>
<td>9%</td>
</tr>
<tr>
<td>Text message (food package would say &quot;Text [number] for more food information&quot;)</td>
<td>7%</td>
<td>10%</td>
<td>19%</td>
<td>20%</td>
<td>25%</td>
<td>19%</td>
</tr>
<tr>
<td>Internet website (food package would say “Visit [Uniform Resource Locator of the website] for more food information”)</td>
<td>6%</td>
<td>13%</td>
<td>26%</td>
<td>24%</td>
<td>22%</td>
<td>10%</td>
</tr>
<tr>
<td>Telephone number (food package would say “Call for more food information”)</td>
<td>4%</td>
<td>9%</td>
<td>15%</td>
<td>16%</td>
<td>17%</td>
<td>39%</td>
</tr>
<tr>
<td>Electronic or digital link (food package would say “Scan here for more food information”)</td>
<td>3%</td>
<td>12%</td>
<td>22%</td>
<td>25%</td>
<td>21%</td>
<td>17%</td>
</tr>
</tbody>
</table>

Q19. If BE food or BE food ingredient information is legally required to be provided by food companies, please rank (with 1 being the top priority and 6 being the lowest priority) how you would like to receive this information. Base=Total Respondents; n=1002
New labels are coming to your food — and you can help decide

Do refined ingredients count as GMOs?
Concerns about GMOs prompt consumer demand for labels

Are GMO Foods Safe? Labeling 'Modified' Products Make Them Less Scary to Consumers, Study Says

Simple labels increase consumer acceptance of GMOs, study finds

Survey finds 80% of Americans want G.M.O. information on packaging
Thank you

Contact:
Alexandra Lewin-Zwerdling
Lewin-Zwerdling@IFIC.org