



Food Labeling Survey
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January 2019



Introduction



Research Objective

- Understand consumer attitudes towards healthy labels and different food packaging aspects that drive purchase behavior.

Sampling

- ✓ Research Now Online Panel
- ✓ Sample size
 - 1,017 total US consumer respondents
 - Representative distribution by region, gender, age, race/ethnicity and household income

Methodology

- ✓ Survey Conducted
 - October 16-26, 2018
- ✓ **Average Length of Survey**
 - 7 ½ minutes
- ✓ **Qualification Criteria**
 - Age 18-80
 - Sole or shared responsibility for household's grocery shopping

SUMMARY & CONCLUSIONS

Although they usually read food packaging labels, consumers sometimes find it difficult to identify healthy food options.

Most consumers look for healthy options when food shopping.

- Two in five (43%) “always” look for healthy options and half (52%) “sometimes” do. Only 5% of surveyed consumers “never” look for healthy options.
- However, finding healthy foods is “difficult” for one in ten consumers (11%); only 28% claim that this is “easy”.



NUTRITION FACTS	
Serving Size: 1 Bar (28g)	
Bars Per Box: 5	
Amount Per Serving	Calories from Fat 90
Calories 110	% Daily Value*
Total Fat 10g	20%
Saturated Fat 6g	12%
Trans Fat 0g	0%
Cholesterol 1mg	2%
Sodium 0mg	0%
Total Carbohydrates 15g	30%
Fiber 8g	16%
Sugars 0g	0%
Erythritol 6g	12%
Protein 2g	4%
Vitamins A 5%	Vitamin C 0%
Calcium 5%	Iron 0%

*Percent Daily Values are based on a 2,000 calorie diet.

Package labeling is a primary source of healthfulness information.

- A majority say they always read labels on a packaged food before buying it for the first time (59% high agreement).
- The Nutrition Facts panel (69%) and the ingredient list (67%) are the two places where the most consumers look for information about food healthfulness.
- Typically, a consumer will look at these labels to determine whether a packaged food has ingredients that they want (45% looked for first) or don't want (31% looked for first).

SUMMARY & CONCLUSIONS

While consumers currently use package information to make decisions about purchasing healthy foods, additional information in the form of a symbol or image would be helpful and would impact purchases.

Package symbols and icons are already being used by consumers to make healthy food purchase decisions, but consumers would be likely to use additional information if provided.

- In addition to the Nutrition Facts panel and ingredient list, half of the surveyed consumers frequently check front-of-package nutrition content icons like the Facts Up Front label, Whole Grain stamp, Heart-Check symbol and Great For You symbol (48%).
- Furthermore, a healthy symbol on a food package would have a strong influence on a consumer's purchase decision. A healthy symbol is ranked third in terms of overall impact, following the taste and price of a food item.
- Consumers agree that a symbol indicating whether a food is healthy would be very helpful (54%) and would make them more likely to purchase a product (45%).

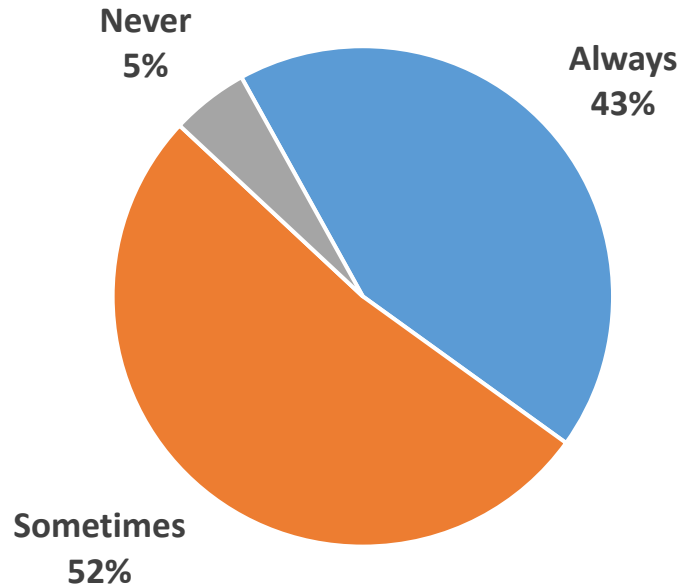


Shopping for Healthy Food

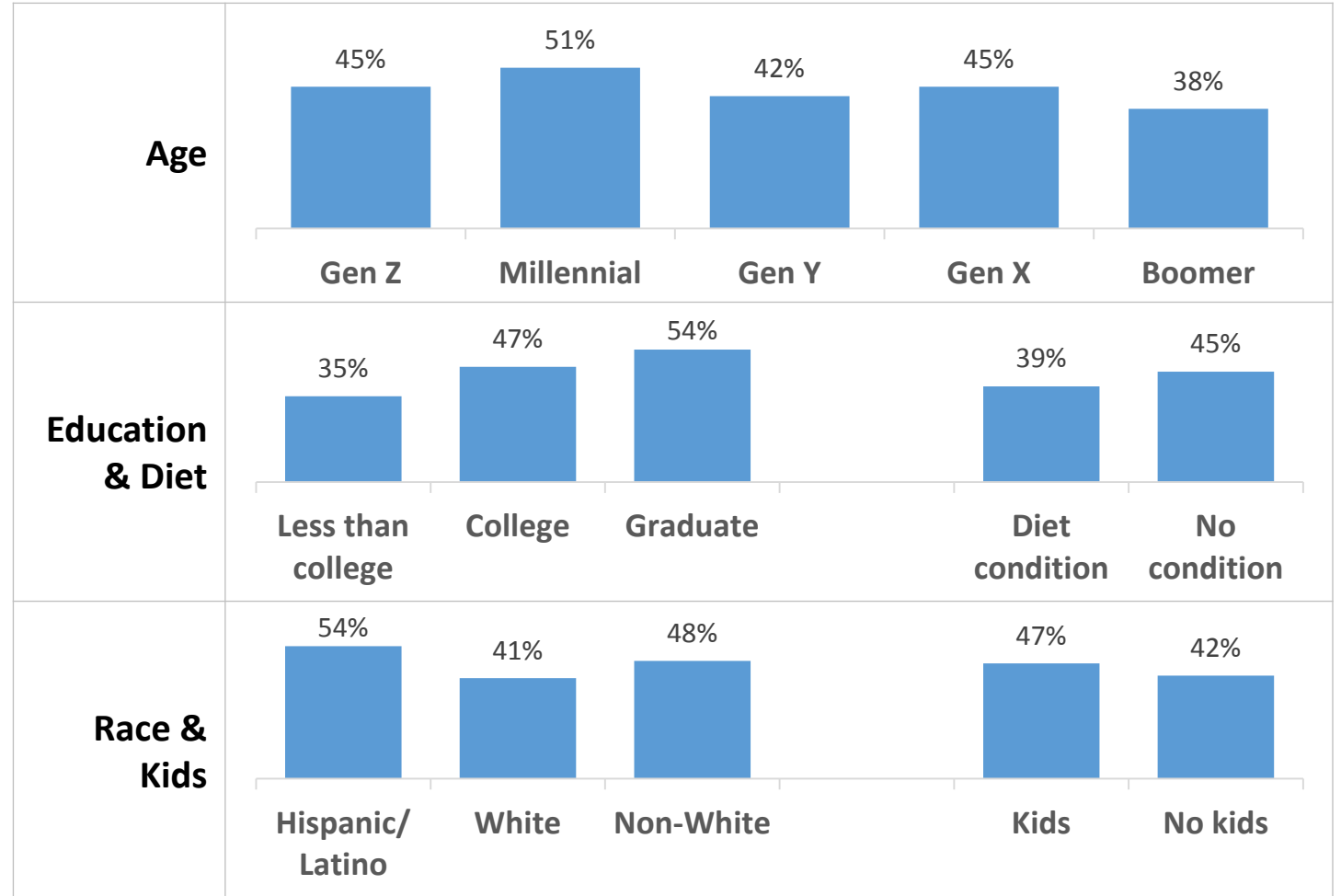


Nearly all surveyed consumers look for healthy options when shopping - at least some of the time. This behavior is more common among younger, highly educated consumers and those with children in the household.

Frequency Look for Healthy Options When Food Shopping
(% of Total)

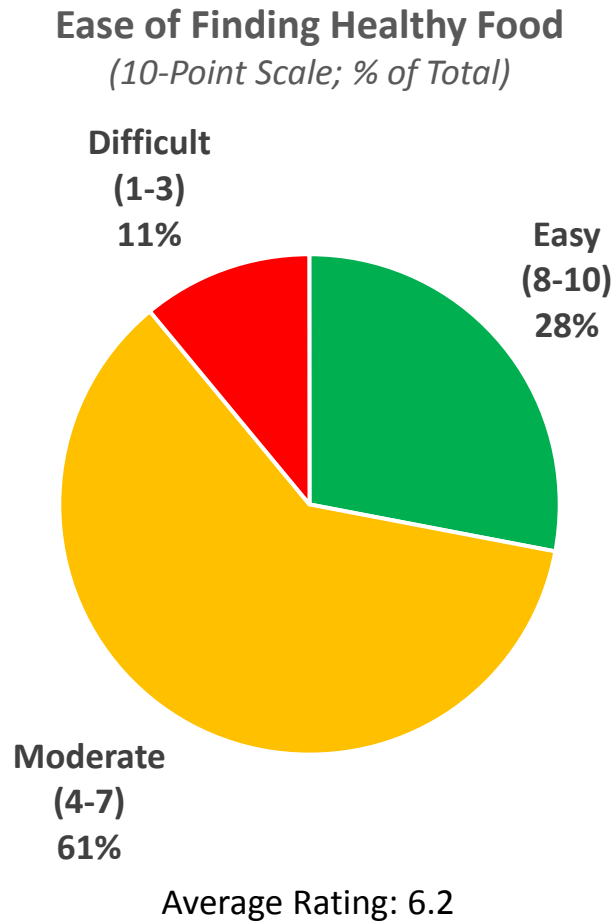


(% Always)

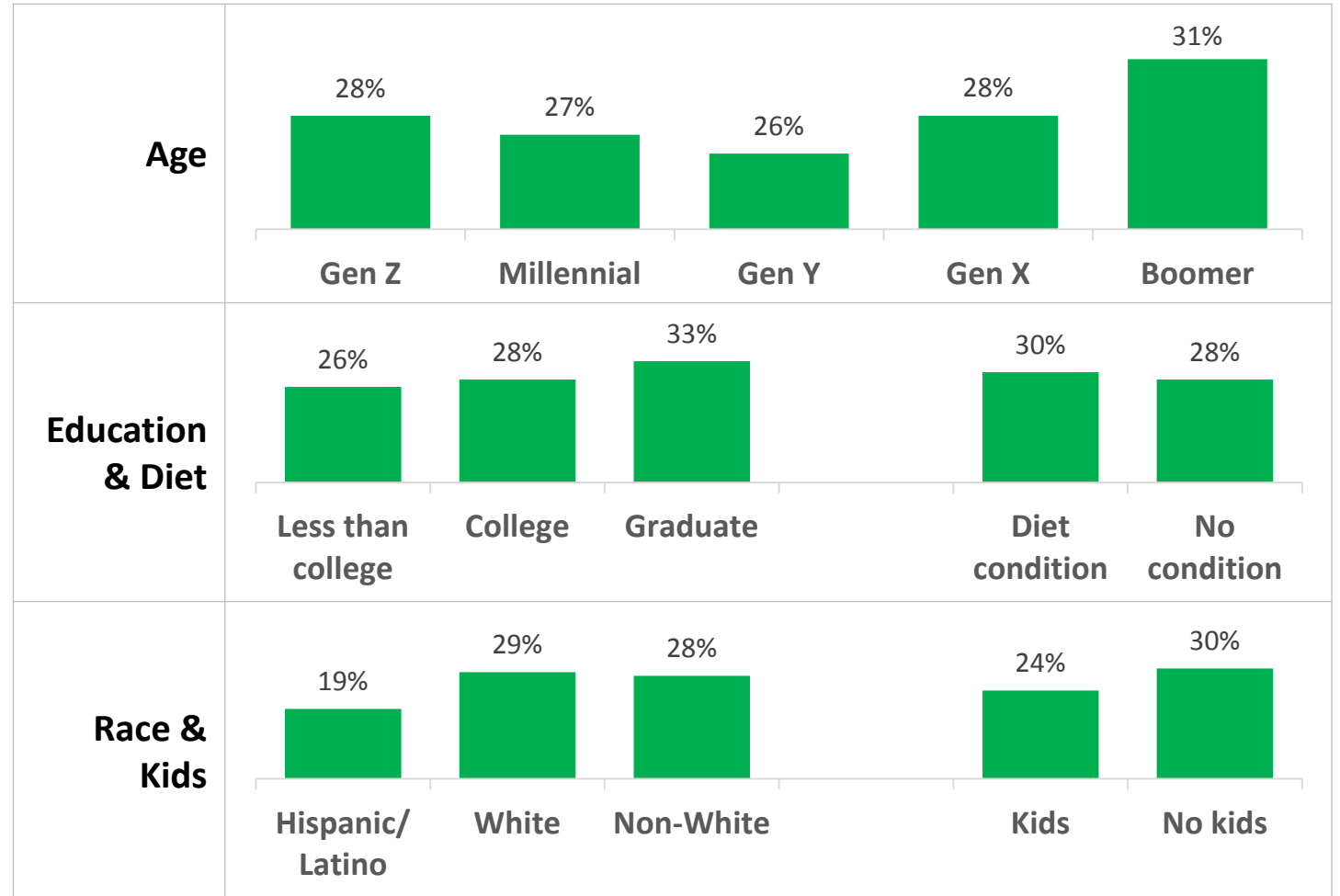


Q9. When shopping for food for your household, how often do you look for healthy options?
Base=Total Respondents; n=1017
Gen Z=Age 18-24; Millennial=Age 25-34; Gen Y=Age 35-44; Gen X=Age 45-54; Boomer=Age 55+

Finding healthy food is only moderately easy for most consumers. Those who are older, highly educated and without children find this easier than others.



(% Easy; Rating 8-10)



Q10. Please indicate how easy or difficult it is to know which foods are healthy when food shopping.

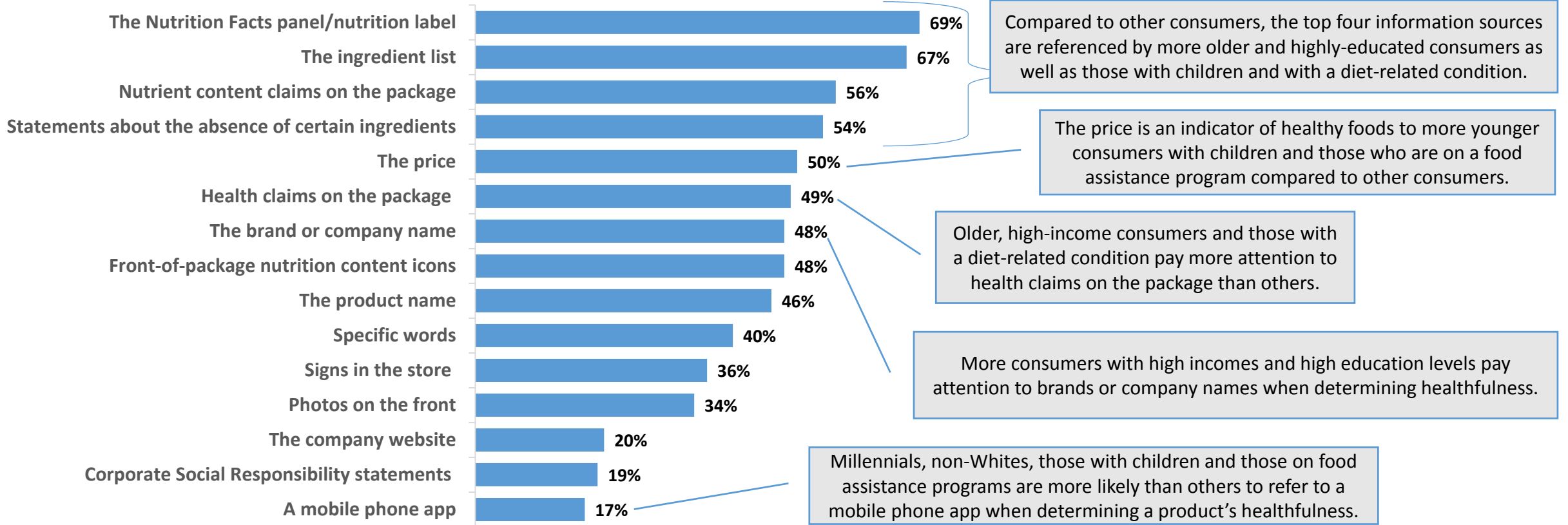
Base=Total Respondents; n=1017

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When shopping, most consumers look at the nutrition label and ingredient list for information about the healthfulness of food items.

Where Consumer Looks for Information about Food Healthfulness

(% Rating 4-5 on 5-Point Scale; 5=Always)



Q11. When looking for healthy packaged foods while shopping, how frequently do you use each of the following in determining a product's healthfulness?
Base=Look for healthy options when shopping; n=971

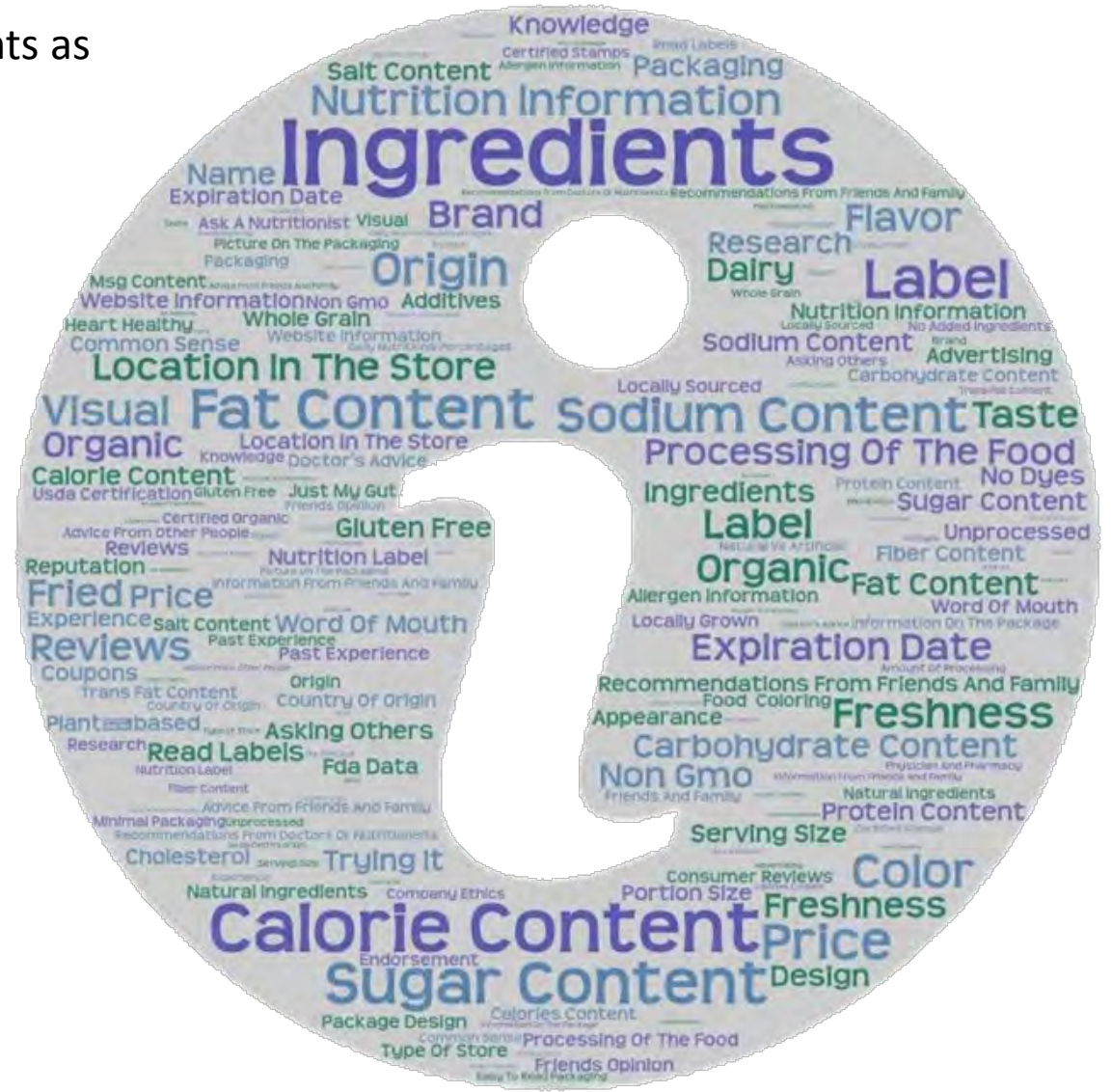
Consumers typically read the label for a food's ingredients as well as the inclusion of sugar, fat and sodium.

Other Information that Consumers Look for to Determine a Food Product's Healthfulness

(Summarized from Open-Ended Responses)

Most frequently mentioned words:

- Ingredients
- Calorie content
- Sugar content
- Fat content
- Sodium content
- Nutrition information
- Freshness
- Label
- Organic

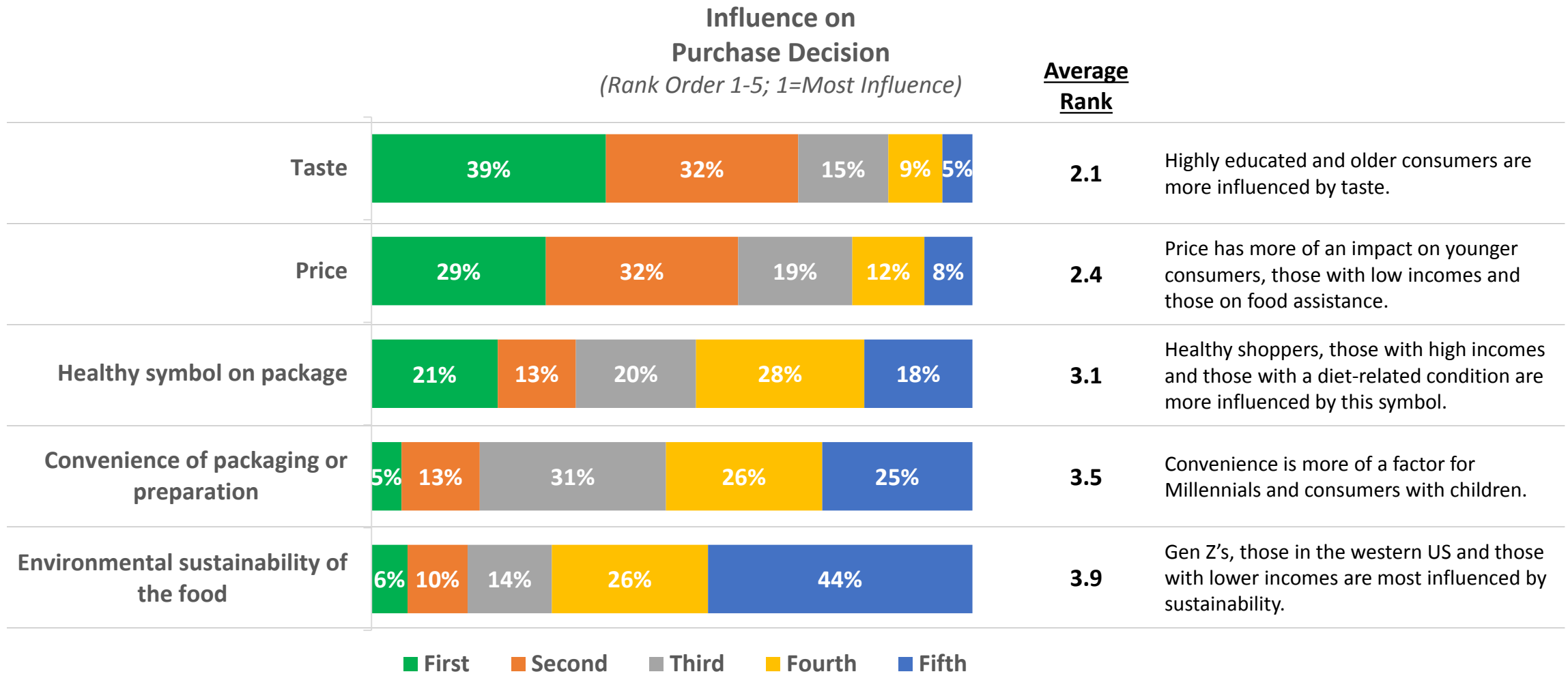


Q12. What other information do you find useful when determining whether a food is healthy when food shopping?
Base=Total Respondents; n=1017

Healthy Food Packaging

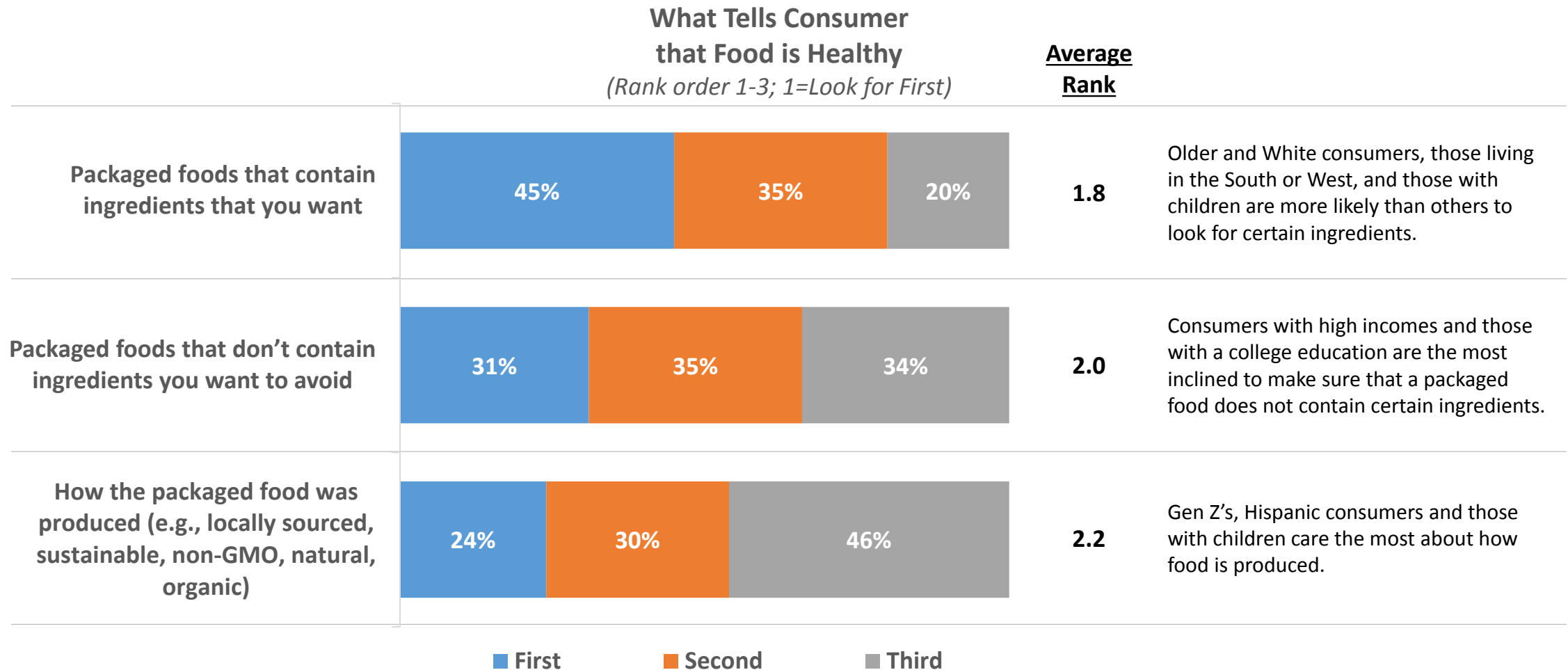


Overall, taste is the primary consideration when making a food purchase, followed by price. The healthy symbol ranks third following these two primary factors.



Q15. Please rank order the following five items in terms of how much influence each would have on your decision to purchase a particular packaged food product.
Base=Total Respondents; n=1017

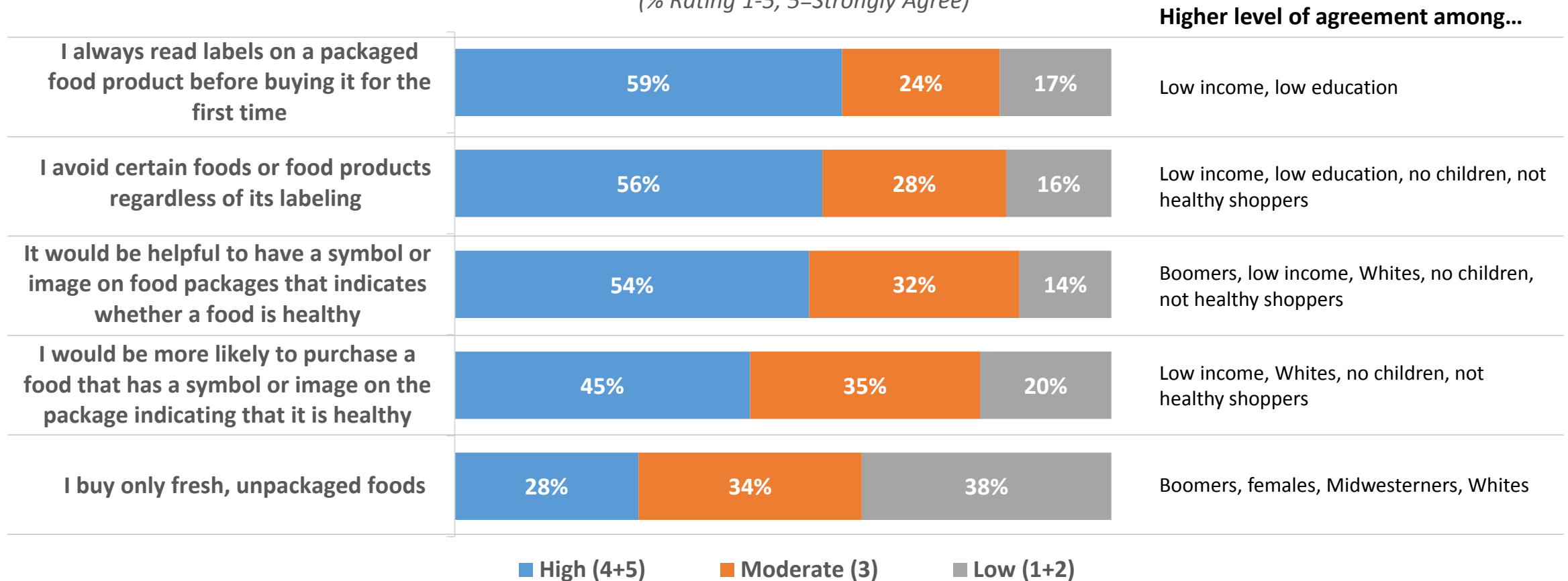
Generally, consumers look for certain ingredients in food that they purchase rather than making sure foods don't contain certain ingredients.



Q13. Please rank order the following three statements in terms of what you look for on a food label or package that tells you if a food is healthy.
Base=Look for healthy options when shopping; n=971

While most consumers always read the labels on their food before purchasing, many would find it helpful and would be more likely to purchase foods if there was a “healthy” symbol on them.

**Agreement with Statements
about Food Packaging**
(% Rating 1-5; 5=Strongly Agree)



Q14. Please indicate your level of agreement with the following statements.
Base=Total Respondents; n=1017

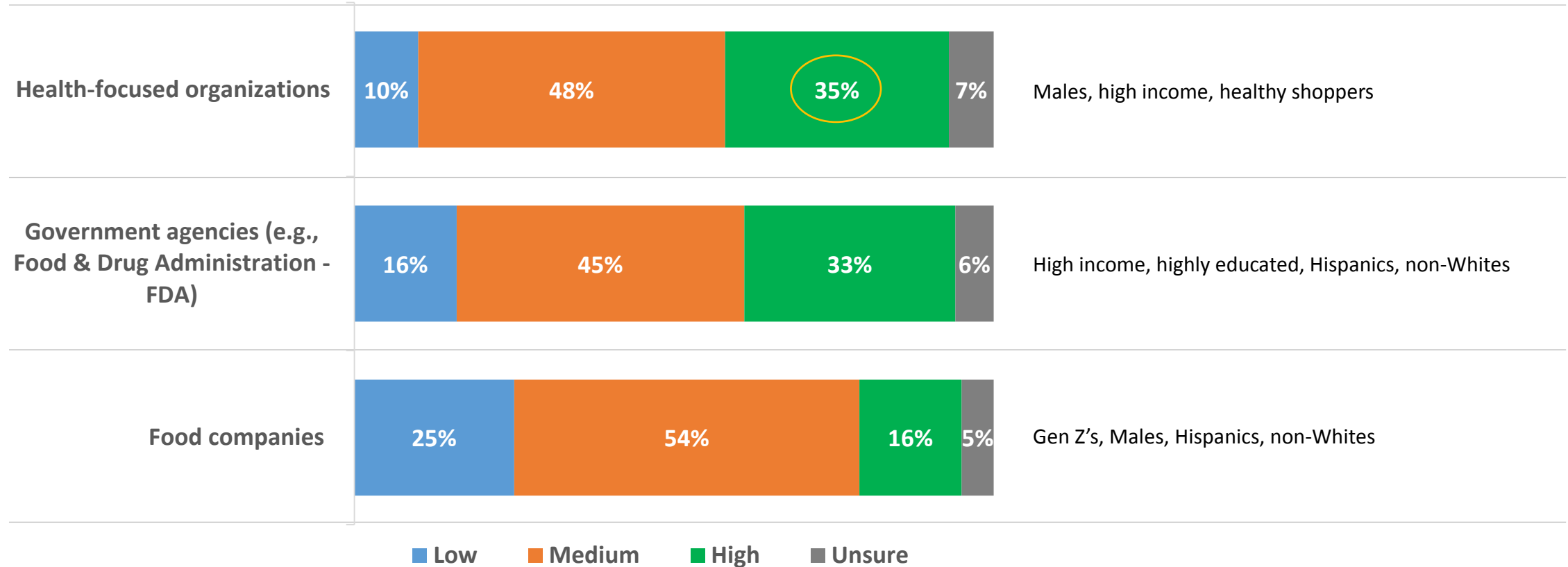
Organizations and Healthy Food Labels



Consumers are somewhat more trusting of health-focused organizations than of government agencies, and much less trusting of food companies in terms of statements made on food packaging.

Level of Trust in Statements Made on Food Packaging by Organizations
(Level 1-3 + Unsure)

Higher level of trust among...

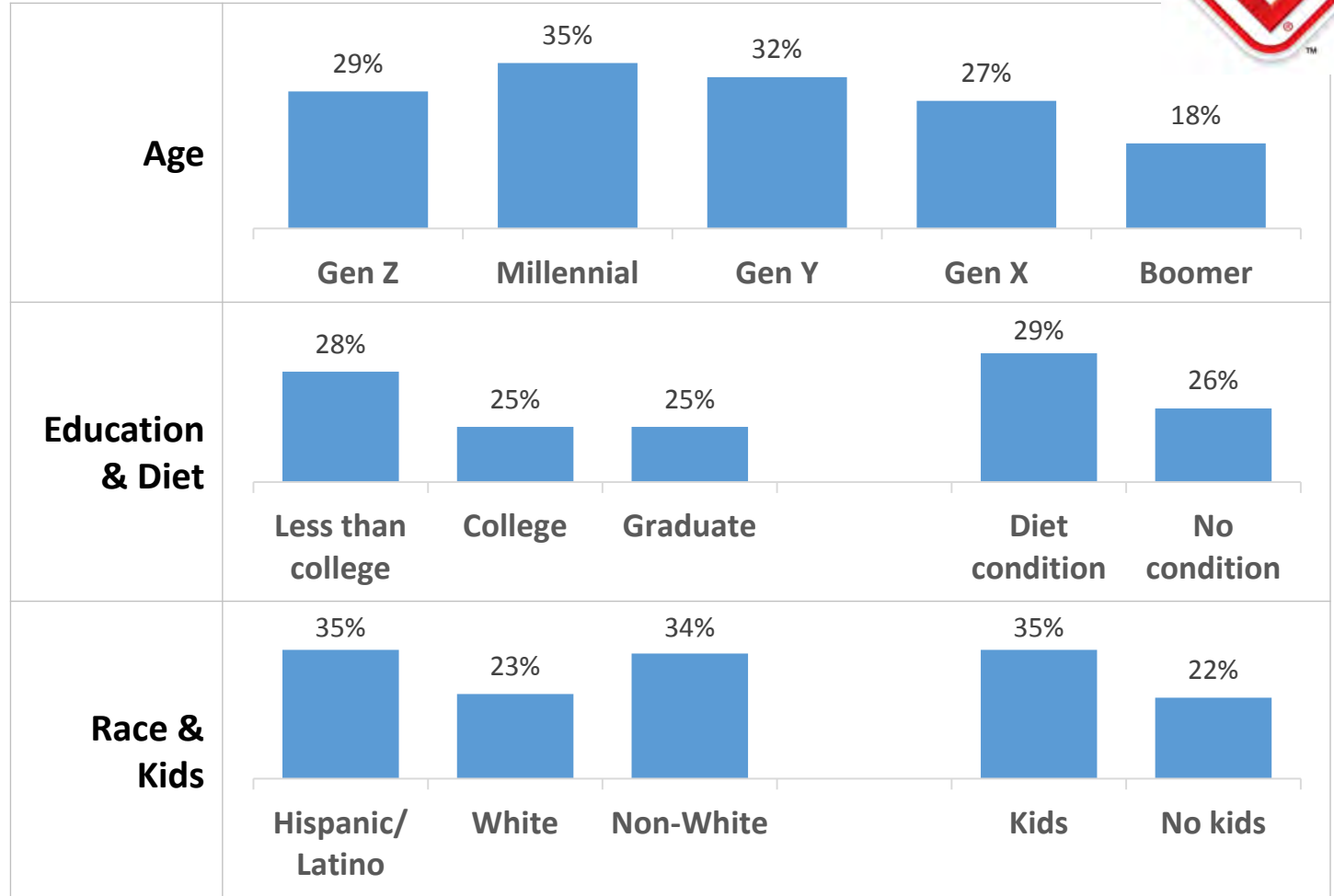


Q16. What level of trust do you have in the statements made on food packaging by each of the following?
 Base=Total Respondents; n=1017

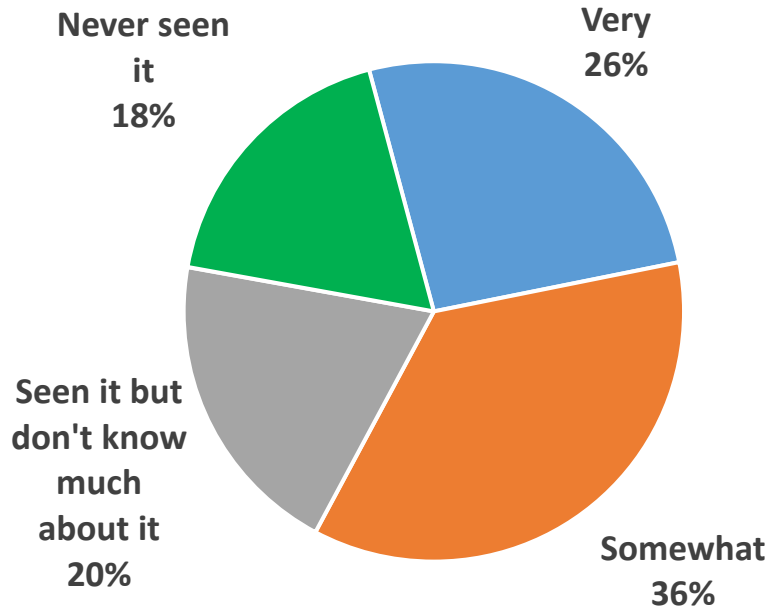
Over half of the consumers surveyed (62%) are at least somewhat familiar with the AHA Heart-Check symbol. Younger consumers, those with a diet-related condition and those with children are more familiar than others.



(% Very Familiar)



Familiarity with American Heart Association's Heart-Check Symbol
(% of Total)



Q17. How familiar are you with the American Heart Association's Heart-Check symbol that appears on some food and beverage packages, shown here?

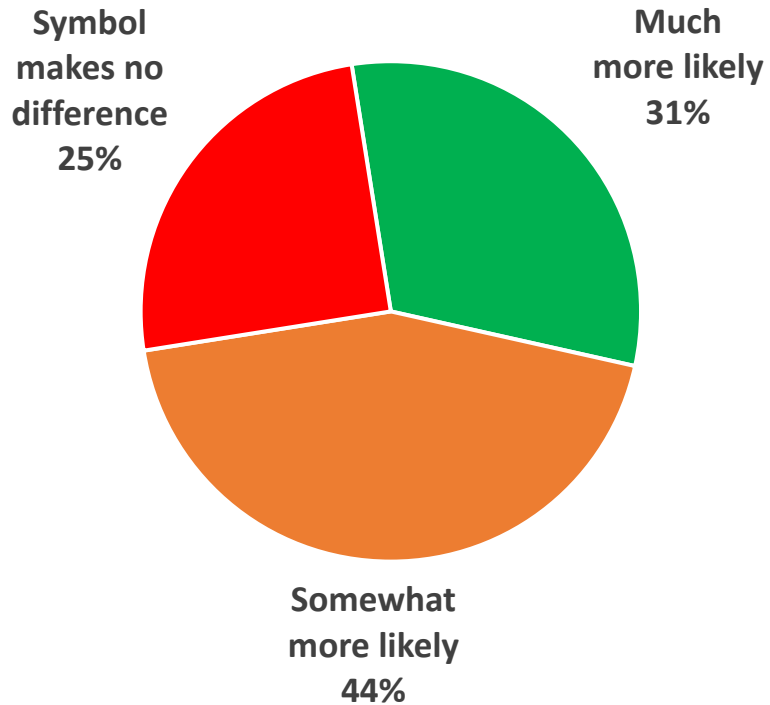
Bae=Total Respondents; n=1017

Gen Z=Age 18-24; Millennial=Age 25-34; Gen Y=Age 35-44; Gen X=Age 45-54; Boomer=Age 55+

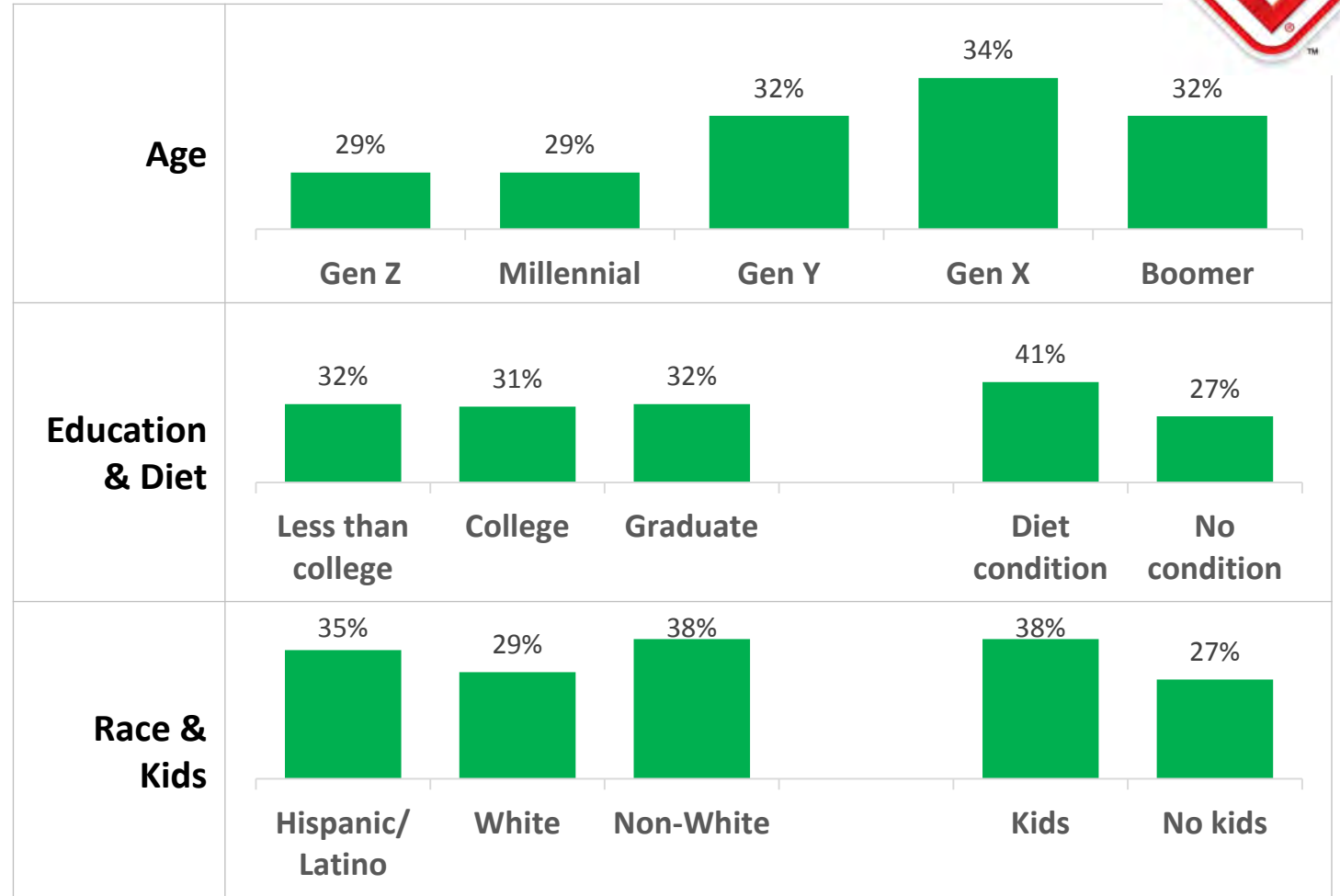
About one in three consumers would choose a food with the Heart-Check symbol over one without it; only one in four say it would have no impact. The symbol is more influential for Gen X'ers, those with a diet-related condition and those with children.



Likelihood to Choose One Food Over Another If It Has the Heart-Check Symbol
(% of Total)



(% Much More Likely)



Q18. When choosing between two identical food products, how likely are you to choose the one with the following symbol?





Bae=Total Respondents; n=1017

Gen Z=Age 18-24; Millennial=Age 25-34; Gen Y=Age 35-44; Gen X=Age 45-54; Boomer=Age 55+

Demographics



Demographics

		<u>Total</u>	<u>Gen Z</u>	<u>Millennial</u>	<u>Gen Y</u>	<u>Gen X</u>	<u>Boomer</u>
n=		1017	96	184	209	189	339
	Gender (Q2)						
	Male	47%	29%	30%	44%	57%	59%
	Female	53	71	70	56	43	41
	Region (Q3)						
	Northeast	18%	9%	16%	19%	24%	19%
	Midwest	21	18	23	23	22	20
	South	38	46	45	37	30	35
	West	23	27	16	21	24	26
	Household Income (Q4)						
	Less than \$25,000	24%	46%	25%	23%	23%	19%
	\$25,000 - \$49,999	15	19	15	14	13	16
	\$50,000 - \$74,999	23	17	29	23	21	21
	\$75,000 - \$99,999	16	8	15	19	16	16
	\$100,000 - \$149,999	14	8	10	12	18	16
	\$150,000 - \$199,999	5	0	3	4	6	8
	\$200,000 or more	3	1	3	4	3	4
Don't know	0	1	0	0	0	0	
	Relationship Status (Q19)						
	Single, never married	30%	69%	41%	32%	25%	15%
	Married or partnered	55	28	54	57	57	59
	Divorced, separated or widowed	15	2	4	11	17	26
	Rather not say	0	1	1	0	1	0

Gen Z=Age 18-24; Millennial=Age 25-34; Gen Y=Age 35-44; Gen X=Age 45-54; Boomer=Age 55+




Demographics

	<u>Total</u>	<u>Gen Z</u>	<u>Millennial</u>	<u>Gen Y</u>	<u>Gen X</u>	<u>Boomer</u>
n=	1017	96	184	209	189	339
Proportion of grocery shopping done personally (Q8)						
All	64%	56%	67%	69%	66%	59%
Most	22	22	22	18	19	28
Some/Shared with another person	14	22	11	13	15	13
Employment Status (Q20)						
Employed full-time	43%	32%	51%	60%	59%	24%
Employed part-time	10	15	13	10	10	8
Temporarily unemployed; seeking work	6	8	8	9	5	3
Unemployed; not seeking work	9	10	14	10	9	4
Student	3	23	3	1	0	0
Full-time caregiver	4	10	10	5	2	0
Retired	23	0	0	4	10	60
Other	3	1	2	2	6	2
Education (Q23)						
High School or less	21%	38%	23%	22%	22%	15%
Trade or Technical School	4	4	3	3	4	4
Some College – No degree	20	28	19	19	22	19
Two-Year College degree (Associate's)	10	113	8	9	10	11
Four-Year College degree (Bachelor's)	26	14	33	28	20	27
Post-graduate work or degree	19	3	15	19	22	24
Rather not say	0	0	0	0	0	0



Gen Z=Age 18-24; Millennial=Age 25-34; Gen Y=Age 35-44; Gen X=Age 45-54; Boomer=Age 55+

Demographics

	<u>Total</u>	<u>Gen Z</u>	<u>Millennial</u>	<u>Gen Y</u>	<u>Gen X</u>	<u>Boomer</u>
n=	1017	96	184	209	189	339
 Ethnicity (Q6)						
White or Caucasian	71%	63%	71%	63%	62%	83%
Black or African American	13	21	15	17	14	8
Asian or Asian American	8	6	6	12	10	6
American Indian, Alaska native, Native Hawaiian or other Pacific Islander	2	0	1	2	4	0
Other	6	10	7	6	10	3
Hispanic/Latino (Q5)	13%	24%	16%	18%	14%	3%
 # People in Household (Q21)						
One, just me	22%	15%	11%	18%	23%	32%
Two	37	19	27	27	37	54
Three	18	30	24	23	19	8
Four	13	21	20	19	13	3
Five or more	10	16	18	12	9	3
Children in household (yes) (Q22)	43%	56%	63%	64%	42%	10%
 Average BMI (calculated average) (Q25/Q26)	29.3	26.2	29.0	30.7	30.8	28.8
Have any diet-related condition such as diabetes, high blood pressure, high cholesterol or something similar (Q24)	30%	14%	16%	22%	29%	47%
Receiving local, state or federal food assistance (Q27)	21%	26%	35%	23%	16%	13%

Gen Z=Age 18-24; Millennial=Age 25-34; Gen Y=Age 35-44; Gen X=Age 45-54; Boomer=Age 55+