



Civicscience Insight Report

Consumer Sentiment on ‘Harmful’ Food Ingredients and Additives

With much focus on “clean eating,” food manufacturers and retailers are making significant moves to capture the trust and loyalty of consumers. Many ingredients and additives found in packaged and prepared foods are being called out for negative impacts on our health. There are always new studies emerging and new articles informing us what to cut out of our diet, making it difficult for consumers to keep up.

In response, an increasing number of restaurants and packaged food and beverage companies are announcing menu and ingredient changes. **Boston Market** in 2014 advertised sodium reduction. **General Mills** reduced sugar by 25% in their original Yoplait yogurts this year. **Pepsi** announced this year it will eliminate aspartame from its diet sodas, swapping it for another artificial sweetener. **Chipotle** announced last month it will seek to eliminate GMOs from their food. And **Panera Bread** recently announced plans to get rid of a whopping 150+ food additives by the end of 2016.

In the midst of what seems like a food ingredient “blacklisting,” what do consumers pick as being most harmful to their health? Will consumers be more influenced to purchase a product that has 25% less sodium or will they be more willing to buy the product if it doesn’t have artificial sweeteners?

By using syndicated data in the Civicscience InsightStore™ platform, we were able to better understand consumers’ thoughts on what ingredients they feel are most harmful and then profile the respondents based on their concerns. In the beginning of April 2015, we launched the following question:

“Which of these do you feel is most harmful to your nutritional health?”

- Added sugar
- Total amount of sugar
- Saturated fats
- Sodium
- Carbs
- Preservatives / chemicals
- GMOs
- I don’t see any of these as harmful to my health

May 19, 2015: Restaurants and packaged food and beverage companies have been making ingredient changes to their menus and food, with some announcing and marketing the changes. But what do consumers believe is most harmful to their health and does it mirror the changes companies are advertising?

This report takes a closer look at consumers’ thoughts on food ingredients and their other health and wellness behaviors.



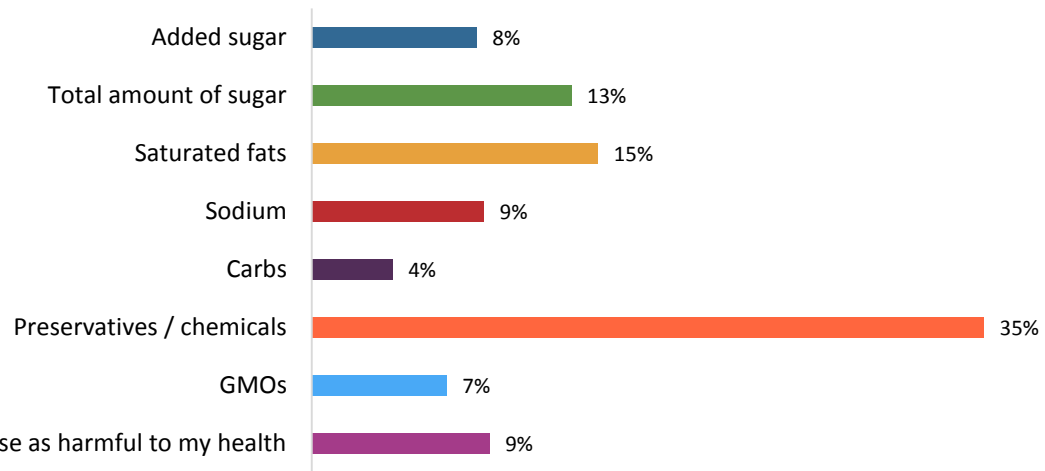
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After collecting a little over 4,200 adult responses from April 10, 2015 to May 6, 2015, consumers are fairly mixed in their opinions – but preservatives/chemicals lead with the most responses at 35%:

Which of these do you feel is most harmful to your nutritional health?

> All respondents

> Weighted according to U.S. Census figures for gender and age, 18 and older



Margin+/- 2% 4,233 responses from 4/10/20154 to 5/06/2015

Generated by CivicScience®

Of those who believe one of the items listed is harmful (eliminating the 9% who don't feel any are harmful), 38% believe preservatives and chemicals are most harmful to their nutritional health, followed by 16% who think saturated fats are the worst, 15% who think total amount of sugar, and 10% answered sodium. However, if you combine the two "sugar" answers, we find that 24% believe sugar is most harmful – making that consumers' second-leading choice. Adults were not as concerned with carbs or GMOs.

Next, we cross-tabbed this question with demographic questions to find consumer profiles of those respondents who chose one of the top 5 food concerns – preservatives and chemicals, amount of sugar (combining those who answered "Added sugar" and "Total amount of sugar"), saturated fat, sodium and GMOs. The demographics of each of the segments are fairly similar across the board, although there are a few attributes that stood out.

DEMOGRAPHICS	Preservatives/ Chemicals	Amount of Sugar	Saturated Fat	Sodium	GMOs
Gender	59% women, 41% men	47% women, 53% men	46% women, 54% men	47% women, 53% men	57% women, 43% men
Age: Millennials (18-34)	28%	30%	32%	26%	33%
Age: 34-54	39%	38%	37%	31%	40%
Age: 55 and over	33%	32%	31%	43%	29%
Income: \$75K and under	62%	58%	62%	64%	64%
Income: over \$75K	38%	42%	38%	36%	36%



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Parent or grandparent	63%	58%	57%	68%	61%
Education: Graduate or professional degree	15%	21%	13%	17%	24%

Women are 44% more likely to be concerned with preservatives and chemicals and are 33% more likely to be concerned with GMOs than men, whereas men are slightly more concerned about sugars, saturated fats, and sodium levels.

Age is very similar among the groups, however, those who answered saturated fats and GMOs as being most harmful to their nutritional health are slightly more likely to fall in the Millennial age bucket than the others. Those who believe sodium is most harmful are more likely to be 55 years old and older. This group is also more likely to have children and grandchildren, which is probably largely due to their age.

Those with a higher income of \$75K and over are slightly more likely to be concerned with sugar levels than the other groups. Those who think saturated fat is most harmful to their health are 44% more likely to have a household income of \$100K-\$125K than average.

When it comes to higher education, those who chose sugar are 24% more likely than average to have a graduate/professional degree, and those who chose GMOs are 41% more likely to have a graduate/professional degree than average.

Deeper Profiles Based on Sentiment

Aside from demographics, we also looked into the psychographics of some of the respondents.

- We focused on those who believe **preservatives / chemicals** are most harmful since this was the most picked answer option.
- We also wanted to dig deeper to find out more about consumers who say **GMOs** are most harmful, which seems to be a hot topic in the news and may be the latest food and cooking trend.

We compared each of the segments to the general population to find things such as respondents' lifestyle and health and wellness habits:

Preservatives / Chemicals

With 35% of U.S. adults choosing this answer option, they are similar to the general population on many fronts – which is useful for food marketers and R&D teams to know. Reducing or touting the lack of preservatives and chemicals may be the “biggest bang for the buck” strategy that will maximize benefits.

That said, those who believe preservatives and chemicals are most harmful to their nutritional health do have some areas of difference from the general population. They are:

- 26% LESS likely to closely follow trends and events in music.
- 24% more likely to NOT use social media.



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- 24% more likely to say GMOs affects their grocery purchases at least the majority of the time.
- 17% more likely to live in a rural area.
- 13% more likely to say they are most influenced by ads on TV (compared to Internet ads or social chatter).
- 12% more likely to watch local TV news every day or most days.
- 10% more likely to eat lunch at home or pack rather than going out to eat.

GMOs

This group of consumers seem to have more differences when compared to the general population. When compared to the general population, those who think GMOs (genetically modified organisms) are most harmful are:

- 117% more likely to be well informed on the topic of GMOs and food.
- 2X more likely to say GMOs affects their grocery purchases at least the majority of the time.
- 91% more likely to make the majority of their grocery purchases at a small, local independent grocery store.
- 40% LESS likely to closely follow trend and events in music.
- 29% more likely to go out to eat or get take out 3 times per week or more.
- 28% more likely to buy organic food frequently.
- 24% more likely to say they most like to snack between lunch and dinner.
- 21% more likely to typically cook dinner for multiple people.
- 21% more likely to live in a rural area.
- 18% more likely to say they are most influenced by ads on TV (compared to Internet ads or social chatter).
- 17% more likely to snack 2 or more times per day.

Overall Thoughts

Many people care about preservatives and chemicals in their food. Although not as many people are concerned with GMOs, this group of consumers seems to have the most differences when compared to the general population. It's important for companies and restaurants to take into account consumers' opinions of what is most harmful to their health and learn about those individuals, especially about their health and wellness and shopping habits. For example, those who care most about GMOs tend to be younger than average and are more likely to snack multiple times a day, but other consumers, such as those who are concerned about sodium levels, are older in age and are more likely to be unaware about the topic of GMOs.

Not all consumers are well informed and keep up with the latest health trends, so it is important for restaurants and food and beverage companies to be a reliable source of information, relaying to customers the importance of their new ingredient modifications and why the change is important.



CivicScience Insight Report (continued)





CivicScience Insight Report (continued)

About the CivicScience Methodology:

CivicScience collects real-time consumer research data via polling applications that run on hundreds of U.S. publisher websites, cycling through thousands of active questions on any given day. Respondents voluntarily opt-in their answers with no incentives, compensation or coercion -- they answer for fun and are kept anonymous, allowing for greatly reduce bias and higher levels of engagement. The 4,233 respondents for this report were weighted for the U.S. Census, 18 years and older, and data were collected from April 10, 2015 – May 6, 2015. CivicScience builds deep, timely psychographic profiles of these respondents with each question they answer over time, providing valuable consumer sentiment and behavior insight data to the decision makers who care. The CivicScience methodology has been scientifically validated by a team of academic leaders and by independent research firms. CivicScience currently has millions of anonymous consumer profiles stored, growing daily.

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