Methodology

- NSF International commissioned Ipsos, an independent research firm, to field an online survey among a nationally representative sample of 1,000 adults ages 18 and older residing in the continental United States.

- The survey was fielded between February 20 - March 1, 2019.

- The margin of error for the sample of 1,000 is +/- 3.0 percentage points at the 95% confidence level.

Note: All base sizes throughout report are as indicated in the methodology, unless noted otherwise in a specific graph.
EXECUTIVE SUMMARY
PRODUCT SAFETY IS A CONCERN BUT ACTION ISN’T BEING TAKEN

Americans are concerned about product safety but aren’t doing their due diligence to research claims. While they find claims to be useful, they aren’t very trusting of them.

SAFETY IS TOP PRIORITY FOR HOME/CLEANING PRODUCTS, OVER COST

When it comes to products used in homes, safety is a top priority—but Americans don’t go the extra mile to learn more. Many don’t usually look at claims and a handful didn’t know they existed.

FOOD QUALITY IS PRIORITIZED OVER SAFETY

Majority of Americans prioritize food quality over safety but aren’t doing their homework with regard to certifications and compliance with standards.

DIETARY SUPPLEMENTS CAUSE MORE CONCERN AMONG YOUNGER GENERATIONS

Fewer Americans are concerned that dietary supplements are harmful to them or their families. However, younger generations are honing in on supplements are crafted.

MISPERCEPTION AROUND QUALITY STANDARDS MAY CAUSE LOW CONCERN FOR PERSONAL CARE PRODUCT SAFETY

Personal care products’ safety is a concern but not a top priority, which may be in part due to misperceptions that all personal care products are held to equally strict quality & safety standards.
The majority of Americans (61%) are concerned about what they put in, on & around their bodies.

Parents and Millennials have much greater concern over the safety of products they consume, use on their bodies and use in their homes:

- **79% of parents** are concerned, compared to **55% of non-parents**.
- **74% of Millennials** are concerned, compared to **64% of Gen X and 53% of Boomers**.
However, despite their concern, many don’t actually do research on product claims. When they do, most use online search engines followed by asking friends/family.

How often do you research claims on the items/products that you purchase?

- Always: 21%
- Sometimes: 22%
- Hardly ever or never: 12%
- I don’t research any product claims: 45%

Which of the following, if any, are you most likely to do when researching claims made on items/products you purchase?

- Search Google, Yahoo, Bing, etc.: 46%
- Ask friends/family: 15%
- Check third-party certification companies: 10%
- Ask doctor or subject matter expert: 10%
- Read company websites: 8%
- Look at media/news stories: 5%
- Ask coworkers: 2%
- Other: 2%

Q11. How often do you research claims on the items/products that you purchase within the following categories? Base: Total (n=1000)
Q12. Which of the following, if any, are you most likely to do when researching claims made on items/products you purchase? Select one. Base: Those who research claims (n=941)
Half of Americans have purchased a product despite being unsure of the validity of the claims being made.

Which of the following items you have ever purchased despite being unsure of the validity of the claims made on a product?

- Products that go in, on, and around my body: 46%
- Products you use in your home: 53%
- The food you consume: 48%
- Products you use on your body: 47%
- Dietary supplements: 34%

45% of parents admit they have still purchased a product despite realizing its claim was invalid (compared to just 17% of non-parents).

Q14. Please select which of the following items you have ever purchased despite being unsure of the validity of the claims made on a product? Base: Total (n=1000), Parents (n=272), Non-parents (n=728)

Q15. Have you ever learned a claim on a product was invalid and still purchased the product? Base: Total (n=1000), Parents (n=272), Non-parents (n=728)
TREND 1: PRODUCT SAFETY IS A CONCERN BUT ACTION ISN’T BEING TAKEN

51% of Americans find claims to be very informative and useful, yet few are trusting. Social channels, new sites, and blogs are the least trusted sources

What source do you trust most when researching claims?

- Government agencies (USDA, FDA, etc.): 29%
- Friends/family: 14%
- Independent third-party certification suppliers: 13%
- Internet news sites: 6%
- YouTube: 6%
- Internet blogs/forums: 6%
- National newspapers, TV and or radio: 3%
- Facebook: 3%
- Local newspapers, TV and or radio: 2%
- Weekly or monthly general interest/news magazines: 2%
- Instagram: 1%
- Twitter: 1%
- Celebrities/public figures: 1%
- Other: 3%
- I don’t research claims: 10%

Men are also more likely to trust endorsed social media and celebrity claims:

- **44% of men** trust claims endorsed on social media, vs. **31% of women**
- **39% of men** trust claims made by influencers/celebrity endorsements, vs. **26% of women**

**Q9.** Which statement most aligns with your opinion about claims made on products that you purchase? I find claims to be very informative and useful

**Q13.** What source do you trust most when researching claims about ____?

**Q7.** How much, if at all, do you trust the following claims related to ____? Base: Total (n=1000), Men (n=482), Women (n=518)
Though Millennials have much greater concern over product safety, younger generations are more trusting of claims that are endorsed on social media and by influencers/celebrities.

How much, if at all, do you trust the following claims?

(Top 2 Box: Percent “Completely Trust” and “Somewhat Trust”)

- Claims endorsed on social media
  - Millennials: 48%
  - Gen X: 51%
  - Boomers: 20%

- Claims made by influencers/celebrity endorsements
  - Millennials: 39%
  - Gen X: 45%
  - Boomers: 18%
TREND 2: SAFETY IS TOP PRIORITY FOR HOME/CLEANING PRODUCTS, OVER COST

When it comes to products used in the home, 41% are very concerned about the safety of cleaning product ingredients.

When thinking about cleaning products, how concerned are you about the following factors?

(Top Box: Percent “Very Concerned”)

<table>
<thead>
<tr>
<th>Factor</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>The safety of the ingredients</td>
<td>41%</td>
</tr>
<tr>
<td>Accuracy of the product claims</td>
<td>29%</td>
</tr>
<tr>
<td>Contains ingredients that I am unfamiliar with</td>
<td>25%</td>
</tr>
<tr>
<td>Eco-friendly/Green</td>
<td>23%</td>
</tr>
<tr>
<td>Where it came from (location)</td>
<td>20%</td>
</tr>
</tbody>
</table>

Parents (91%) are more likely to think it’s important for the products used in their homes to comply with strict standards to ensure they are not harmful to them and their families (vs. 85% of non-parents).

Q3. How concerned are you about the products you use in your home (i.e., cleaning products, air fresheners, etc.) being harmful to you/your family?

Q4. How important is it for the products you use in your home to comply with strict standards to ensure they are not harmful to you/your family?

Base: Total (n=1000), Parents (n=272), Non-parents (n=728)
However, two in five don’t go the extra mile to learn more about product claims on home/cleaning products, and half aren’t even aware that home/cleaning products could receive safety certifications.

How often do you look at claims on cleaning products?

- Always: 17%
- Sometimes: 17%
- Hardly ever: 24%
- I don’t research product claims: 41%

83% agree they are more likely to trust a cleaning product with a certification.

47% didn’t realize cleaning products could be certified for environmental and human safety.
**TREND 3: FOOD QUALITY IS PRIORITIZED OVER SAFETY**

When purchasing food, quality trumps safety in purchase decisions, and over a third never even look at the claims made on food items.

Q2. What are the most important factors you consider when purchasing the food you consume?

Q18. How often do you look at the claims made on food items? Base: Total (n=1000)

<table>
<thead>
<tr>
<th>Factor</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quality</td>
<td>83%</td>
</tr>
<tr>
<td>Price</td>
<td>64%</td>
</tr>
<tr>
<td>Safety</td>
<td>59%</td>
</tr>
<tr>
<td>Brand</td>
<td>39%</td>
</tr>
<tr>
<td>Environmental impact</td>
<td>22%</td>
</tr>
<tr>
<td>Animal welfare</td>
<td>21%</td>
</tr>
<tr>
<td>Other</td>
<td>3%</td>
</tr>
</tbody>
</table>

36% hardly ever or never research product claims on food products

Always: 45%
Sometimes: 19%
Hardly ever: 15%
I don’t research product claims: 21%
Many assume that food products already adhere to strict quality & safety standards, which may account for 53% of Americans who don’t check that their food adheres to such standards.

Do you agree or disagree with the following statements?

(Top Box: Percent “Strongly Agree” and “Somewhat Agree”)

81% say they assume food products they use adhere to strict quality and safety standards

53% do not check to see if food products are verified as adhering to strict quality and safety standards
**TREND 3: FOOD QUALITY IS PRIORITIZED OVER SAFETY**

The majority are concerned about whether non-GMO/organic/gluten-free food is certified, yet most are overwhelmed and confused by food certifications, to the point of ignoring them.

When thinking about foods that are non-GMO, organic and/or gluten-free, how concerned are you about the following?

(Top Box: Percent “Very Concerned” and “Somewhat Concerned”)

<table>
<thead>
<tr>
<th>Item</th>
<th>Concerned</th>
</tr>
</thead>
<tbody>
<tr>
<td>How the product was produced</td>
<td>73%</td>
</tr>
<tr>
<td>How the product was grown</td>
<td>70%</td>
</tr>
<tr>
<td>Where the product was produced</td>
<td>69%</td>
</tr>
<tr>
<td>Whether it is certified by an independent certifier</td>
<td>68%</td>
</tr>
<tr>
<td>Where the product was grown</td>
<td>67%</td>
</tr>
</tbody>
</table>

75% say there are so many food certifications that they lose track of what they mean.

48% have purchased food items despite being unsure of the validity of claims made on the product.

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Q16. When thinking about foods that are non-GMO, organic and/or gluten-free, how concerned are you about the following?
Q17. Please indicate the extent to which you agree or disagree with the following statements about food certifications:
Q14. Please select which of the following items you have ever purchased despite being unsure of the validity of the claims made on a product? Base: Total (n=1000)
### TREND 4: DIETARY SUPPLEMENTS CAUSE MORE CONCERN AMONG YOUNGER GENERATIONS

While most Americans are hyper focused on whether food products are harmful to them or their families, fewer are concerned that dietary supplements are.

<table>
<thead>
<tr>
<th>How concerned are you about ____ being harmful to you/your family?</th>
<th>Base: Total (n=1000)</th>
</tr>
</thead>
<tbody>
<tr>
<td>The food you consume</td>
<td>69%</td>
</tr>
<tr>
<td>Products used in your home</td>
<td>63%</td>
</tr>
<tr>
<td>Products you use on your body</td>
<td>61%</td>
</tr>
<tr>
<td>Dietary supplements</td>
<td>52%</td>
</tr>
</tbody>
</table>

*Q1. How concerned are you about ____ being harmful to you/your family? Base: Total (n=1000)*

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TREND 4: DIETARY SUPPLEMENTS CAUSE MORE CONCERN AMONG YOUNGER GENERATIONS

Millennials & Gen Xers have more concerns than Boomers over dietary supplements, including whether they are organic, contain preservatives, and how they were produced.

When thinking about dietary supplements, how concerned are you about the following factors?

(Top Box: Percent “Very Concerned” and “Somewhat Concerned”)

<table>
<thead>
<tr>
<th>Factor</th>
<th>Millennial</th>
<th>Gen X</th>
<th>Boomer</th>
</tr>
</thead>
<tbody>
<tr>
<td>How the product was grown</td>
<td>76%</td>
<td>73%</td>
<td>73%</td>
</tr>
<tr>
<td>Where the product was produced</td>
<td>72%</td>
<td>72%</td>
<td>72%</td>
</tr>
<tr>
<td>Where the product was grown</td>
<td>72%</td>
<td>72%</td>
<td>72%</td>
</tr>
<tr>
<td>Contains preservatives</td>
<td>71%</td>
<td>75%</td>
<td>71%</td>
</tr>
<tr>
<td>Contains GMOs</td>
<td>66%</td>
<td>60%</td>
<td>70%</td>
</tr>
<tr>
<td>Whether it is organic</td>
<td>67%</td>
<td>61%</td>
<td>61%</td>
</tr>
<tr>
<td>Athletic-banned substances</td>
<td>57%</td>
<td>67%</td>
<td>72%</td>
</tr>
</tbody>
</table>

Q19. When thinking about dietary supplements, how concerned are you about the following factors? Base: Millennials (n=252), Gen X (n=292), Boomers (n=307)
TREND 5: MISPERCEPTION AROUND QUALITY STANDARDS MAY CAUSE LOW CONCERN FOR PERSONAL CARE PRODUCT SAFETY

Majority of Americans (85%) are concerned about the safety of the ingredients in personal care products but only 58% list safety among the most important factors when purchasing them.

When thinking about personal care items how concerned are you about the following factors? (Top Box: Percent “Very Concerned” and “Somewhat Concerned”)

- The safety of the ingredients: 85%
- Accuracy of the product claims: 79%
- Contains ingredients that you do not know (artificial or synthetic ingredients): 73%
- Where it came from (location): 62%
- Whether it is organic: 50%

What are the most important factors you consider when purchasing the products you use on your body?

- Quality: 79%
- Price: 69%
- Safety: 58%
- Brand: 45%
- Animal welfare: 20%
- Environmental impact: 19%
- Other: 2%
- I don’t purchase personal care products: 1%
TREND 5: MISPERCEPTION AROUND QUALITY STANDARDS MAY CAUSE LOW CONCERN FOR PERSONAL CARE PRODUCT SAFETY

Nearly half (45%) of Americans hardly ever or never look at claims on personal care products and automatically assume that all personal care products are safe.

How often do you look at claims on personal care items?

- 38% Always
- 28% Sometimes
- 17% Hardly ever
- 17% I don’t research product claims

Do you agree or disagree with the following statements?

(Top Box: Percent “Strongly Agree” and “Somewhat Agree”)

- 81% I assume personal care products I use adhere to strict quality and safety standards
- 60% I don’t check to see if personal care products are verified as adhering to strict quality and safety standards
TREND 5: MISPERCEPTION AROUND QUALITY STANDARDS MAY CAUSE LOW CONCERN FOR PERSONAL CARE PRODUCT SAFETY

Misperceptions may be partly due to the fact that 60% of Americans do not check if personal care items adhere to standards and half do not know they could be certified in the first place.

Do you agree or disagree with the following statements about personal care item certifications?

(Top Box: Percent “Strongly Agree” and “Somewhat Agree”)

- I am more likely to trust a personal care product with a certification: 85%
- Personal care items should require stricter certifications: 79%
- I don’t check to see if personal care products are verified as adhering to strict quality and safety standards: 60%
- I didn’t realize personal care items could be certified for quality and safety: 52%
- I am very familiar with personal care item certifications: 48%
- I do not trust most personal care certifications: 43%

33% trust a sale representative recommending a personal care product without looking at the label.
Independent organizations have Americans’ trust when it comes to product claims. While few trust claims made by influencers/celebrity endorsements, NSF has an opportunity to leverage social media to educate consumers and become a trusted third-party source.

How much, if at all, do you trust the following claims related to...?

- Claims tested and certified by an independent organization: 85%
- Claims made by government agencies: 78%
- Claims made by other consumers: 77%
- Claims made by the product manufacturer or brand: 70%
- Claims endorsed on social media: 37%
- Claims made by influencers/celebrity endorsements: 32%