



INCA Modern Parenthood Survey

Results & Analysis

Summer 2015

FOR INTERNAL DISTRIBUTION ONLY



INFANT NUTRITION
COUNCIL OF AMERICA



A Review of Our Research

INCA Modern Parenthood Survey | Summer 2015



INCA GAP Analysis Review

- I. The “battle for the truth about infant nutrition” is a recent occurrence and a function, not as much of anti-formula sentiment, but of a strong, pro-breast feeding movement.
- II. Analysis of conversation and search activity around breast feeding and formula indicates that **consumers have a generally positive view of formula.**
- III. The key challenge for conversations about infant formula is that the vast majority of high-visibility information online is driven by a small, but vocal, core group of pro-breast feeding advocates (lactivists) that account for the majority of the negative infant formula conversation online.
- IV. Interestingly, there is significant overlap for lactivists with the larger, anti-industry, anti-marketing, anti-GMO movement.
- V. Critical to winning the “battle for the truth about infant nutrition” is **unlocking the power of the “silent majority”** of consumers who benefit from and have positive perceptions of infant formula but are discouraged from speaking up due to societal polarization around breastfeeding and infant formula.

Recommended Strategy

1

Flip The Script

The data suggests that even when infant formula wins, it still faces ingrained bias from those whose minds cannot and will not be changed.

In order for INCA to win, we have to “Flip The Script” from defending infant formula to defending those that USE infant formula.

2

Focus On Lifestyles

Once we “Flip The Script” we can begin to focus not only on the technical aspects of infant formula but the lifestyle benefits it provides.

Specifically, INCA can champion not just infant formula but the quality of life to parents and children.

3

Elevate The Game

Finally, INCA can use the lifestyle approach to create a content brand and campaign to elevate the uses of and purpose of infant formula.

This brand and campaign can and should focus on parents and the lifestyle benefits they achieve from infant formula.



INCA Modern Parenthood Survey

INCA Modern Parenthood Survey | Summer 2015



Hypothesis:

There's a difference in what people are saying about infant formula versus their actual behavior.

INCA Survey

Methodology

- 15 question online survey, hosted by FluidSurveys and managed by Kellen's Digital Strategy department.
- Census representation panel:
 - United States of America
 - Parents, male and female
 - Birthing ages, 18 – 40
- 1,513 completed responses
- Partnered with Cint, a company with access to over 800 different panels owned by accredited publishers, local media outlets, market research agencies and non-profits.



FluidSurveys





Hypothesis: CONFIRMED

By all accounts and measurements the use of formula - as part of a larger plan for a child's early life nutrition - is an important part of modern parenthood.

Executive Summary

- Our survey showed parents see breastfeeding as ideal and planned for, while **infant formula is seen as practical and flexible**. Both are perceived positively and media coverage is generally believed to be positive about both methods.
- Combination feeding is the most popular choice by far because the feeding method used correlates strongly with work status. Specifically, 43 percent say they use a combination of infant formula and breastfeeding. **Fifty-nine percent of all parents said they include infant formula in their child's early life nutrition.**
- The survey highlights that **this isn't about breastfeeding vs. infant formula**. This is about using the only two safe infant nutrition choices in a combination that allows a family to raise a healthy baby in a happy environment.
- As we see with CDC data, infant formula use is higher among parents that work, either part-time or full-time, and those who go to school. But breastfeeding is still a part of the plan. **Using formula as part of the mix is allowing families to meet their baby's needs while still fully participating in society**- work, other children's activities, community involvement, etc.
- **Families that exclusively breastfeed are more likely to do so based on emotional and ideological reasons** and are more likely to get their information from friends and family, blogs and books/DVDs. Families that use some amount of infant formula are more likely to do so because of practical reasons (such as going back to work or school) and are more likely to get their information from healthcare professionals, such as their pediatrician.
- **We see a general decrease in exclusive infant formula AND exclusive breast feeding as income and education increases.** Families with a greater demand on their time are more likely to use a combination of infant formula and breast milk. This suggests practicality and time management have a much stronger influence on infant feeding than idealism and desires. Infant formula allows parents to meet the demands in their lives and still raise a happy, healthy baby.
- Somewhat concerning – parents surveyed said **they perceived homemade infant formula to be a slightly safer source of nutrition than breast milk purchased online or infant formula bought on a C2C website.** However, homemade infant formula was still perceived as less safe than the other options.




Topline Findings


INCA Modern Parenthood Survey | Summer 2015




59% of all parents include formula in their child's early life nutrition.




Parents who include infant formula in their child's early life nutrition are **10% more likely** to consult a healthcare profession, while parents who exclusively feed breast milk are **24% more likely** to consult with friends and family.



Parents that include formula in their child's early life nutrition were **just as concerned about the overall health and wellbeing of their child as parents who fed their baby breast milk exclusively.**




The decision to include formula in a child's early life nutrition is **59% more likely** to be made once the child arrives home from the hospital.



Parents that chose to feed their baby breast milk exclusively were **24% more likely** to consult friends and family before making their decision and **42% more likely** to make that decision before bringing their child home.



All parents believed strongly that breast milk from the baby's mother and infant formula bought in a store or from a verified online business were safe for babies.



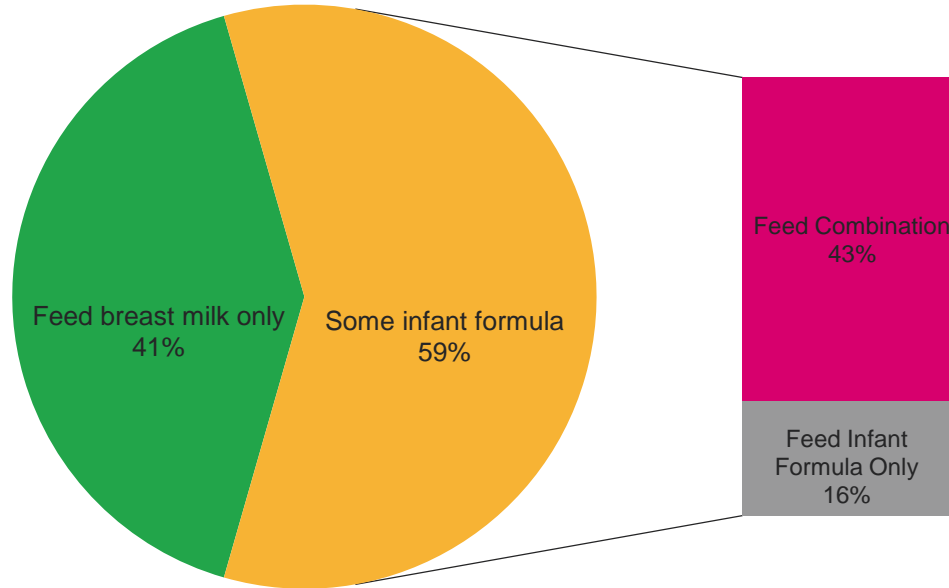
Our survey showed **no statistical difference** in age, gender, sexual orientation (too small sample size), or marital status when it came to the decision to include formula in a child's early life nutrition.



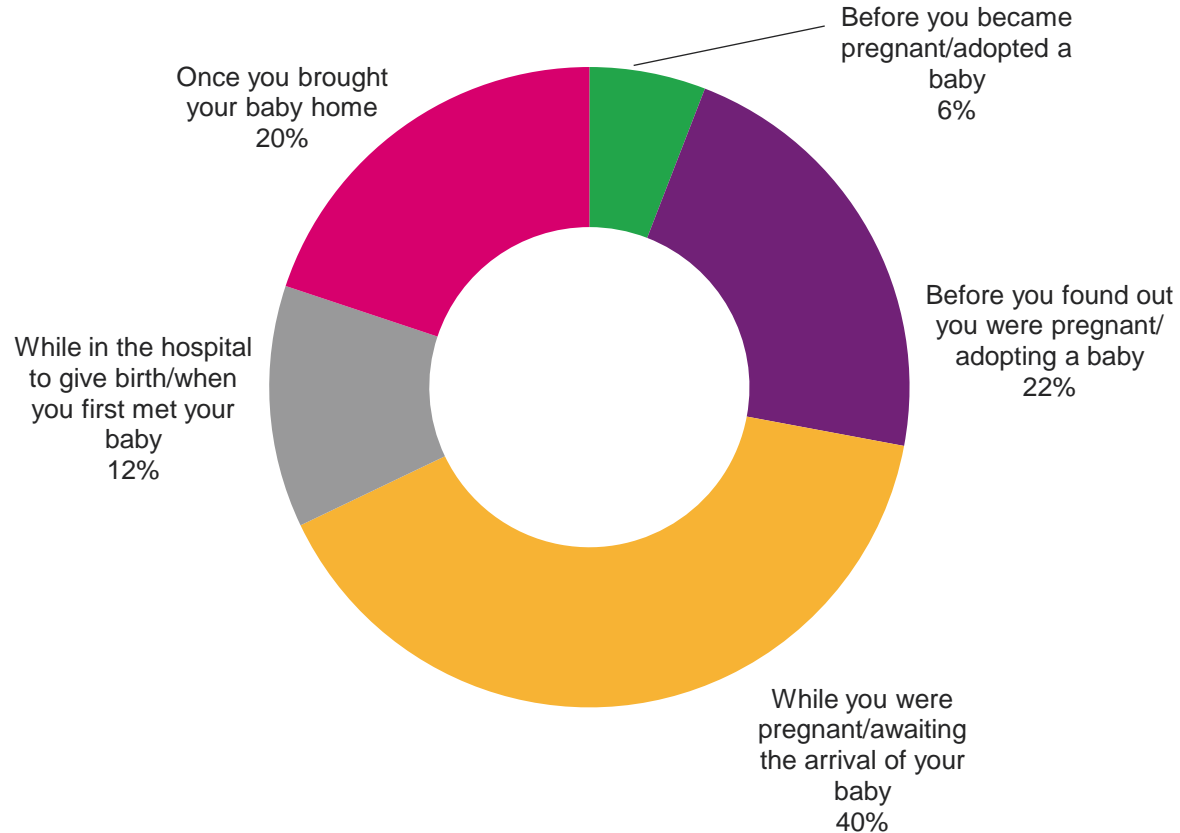
DETAILED FINDINGS

INCA Modern Parenthood Survey | Summer 2015

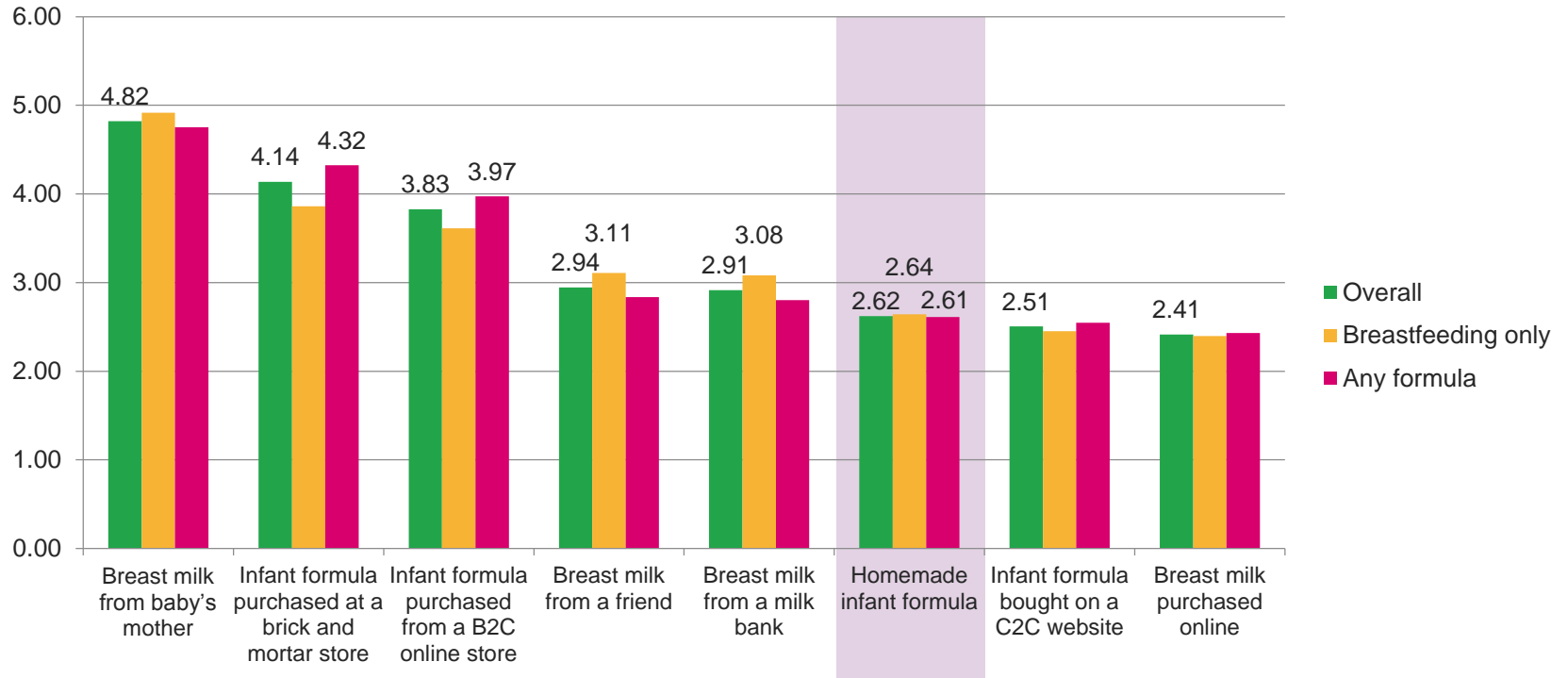
Feeding Methods by Type



Decisions on Feeding



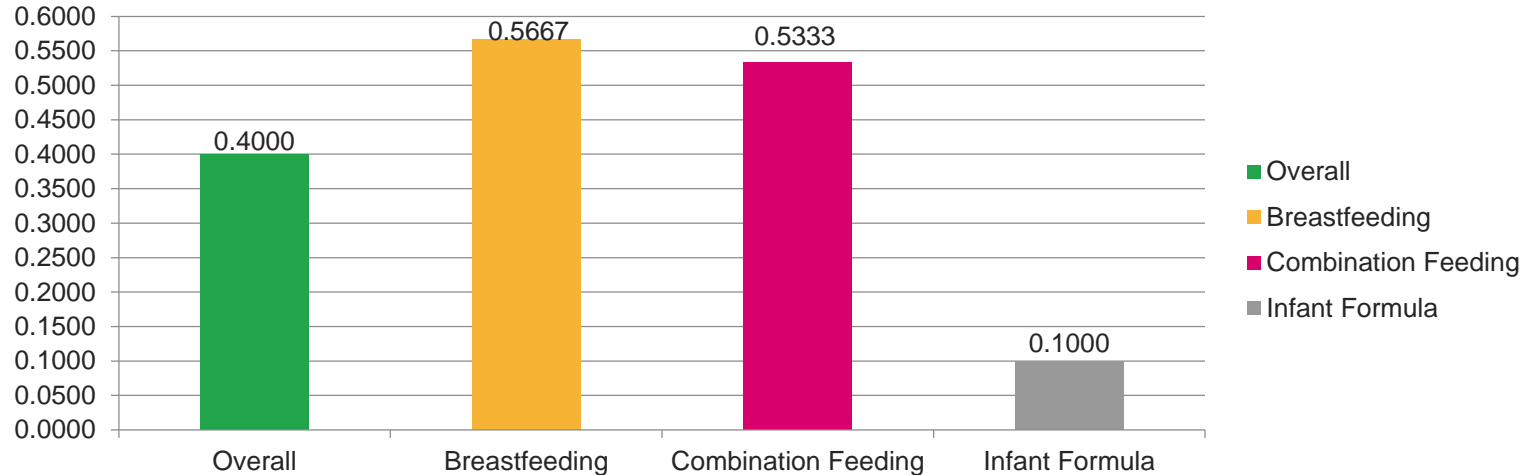
Perceived Safety of Feeding Methods/Sources



Words Used to Describe Different Feeding Methods

Combination feeding is the most common method among parents and it is the second most popular method in terms of perception. In terms of sentiment, words used to describe combination feeding were negligibly less positive than those used to describe breastfeeding, but significantly more positive than those used to describe formula feeding.

All parents predominantly used positive words to describe all three feeding methods.



1 = Positive, 0 = Neutral, -1 = Negative

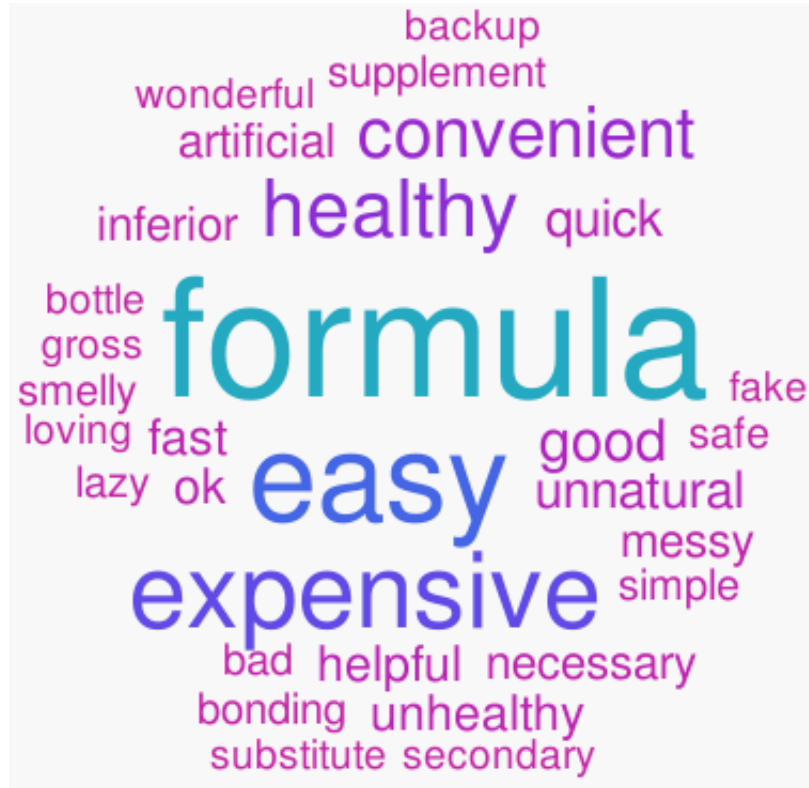
Words Used to Describe Breastfeeding



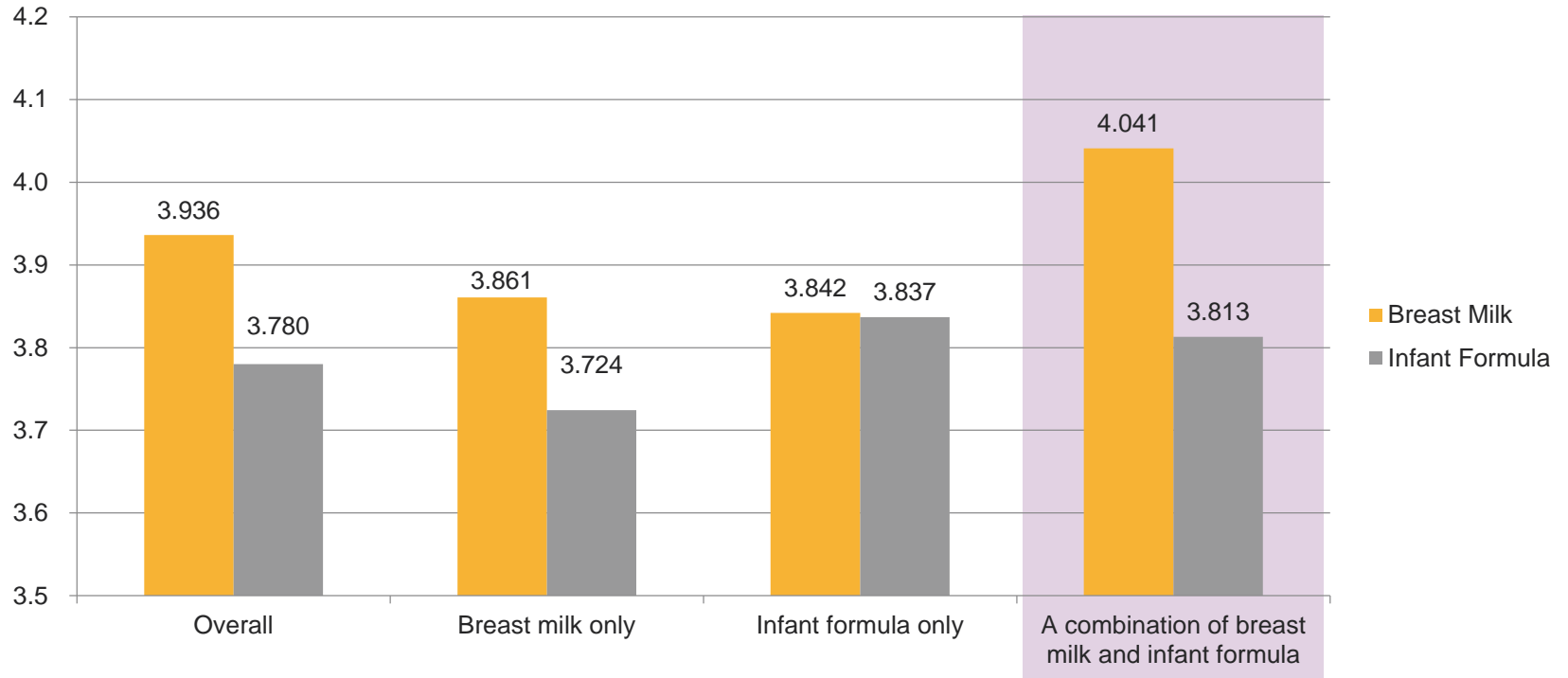
Words Used to Describe Combination Feeding



Words Used to Describe Formula Feeding

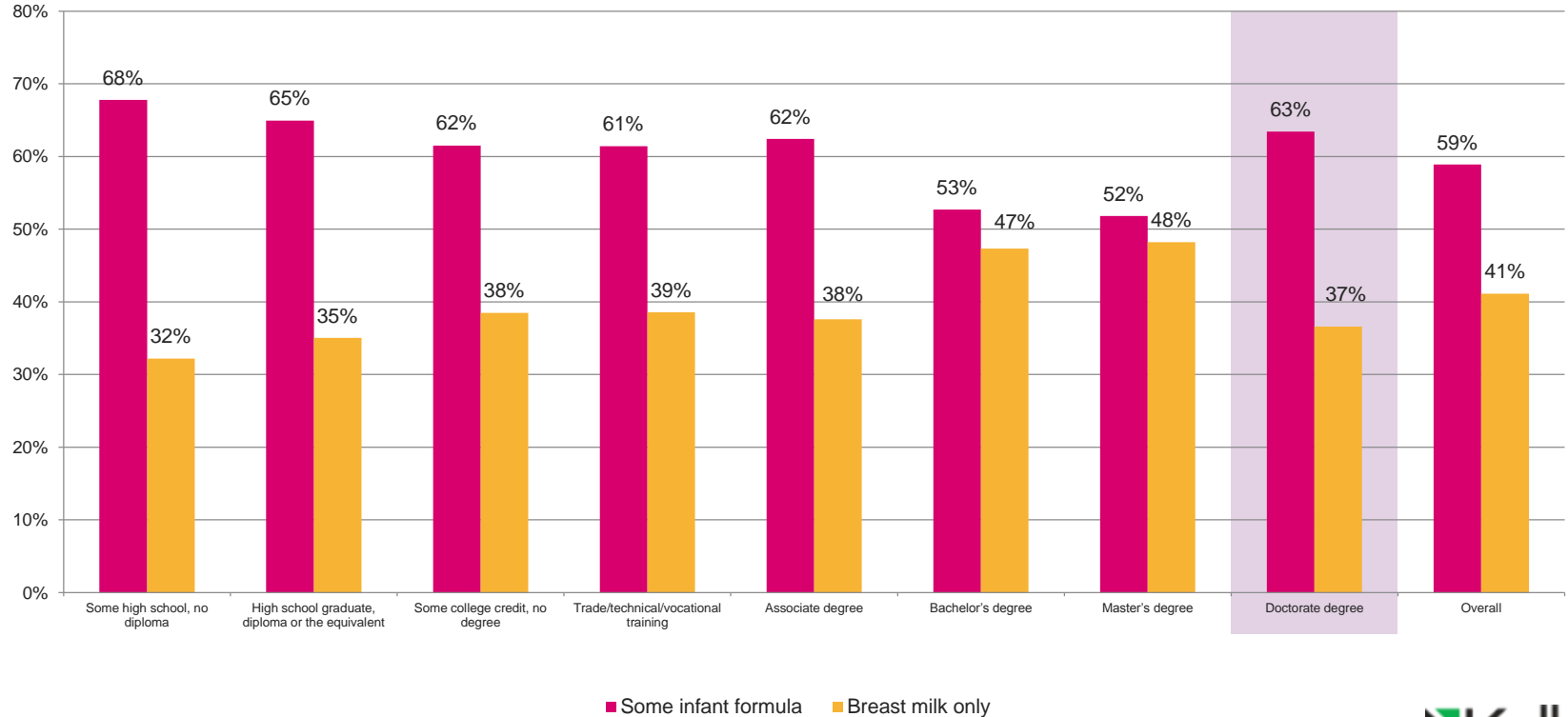


Perceptions of Media Coverage by Feeding Method

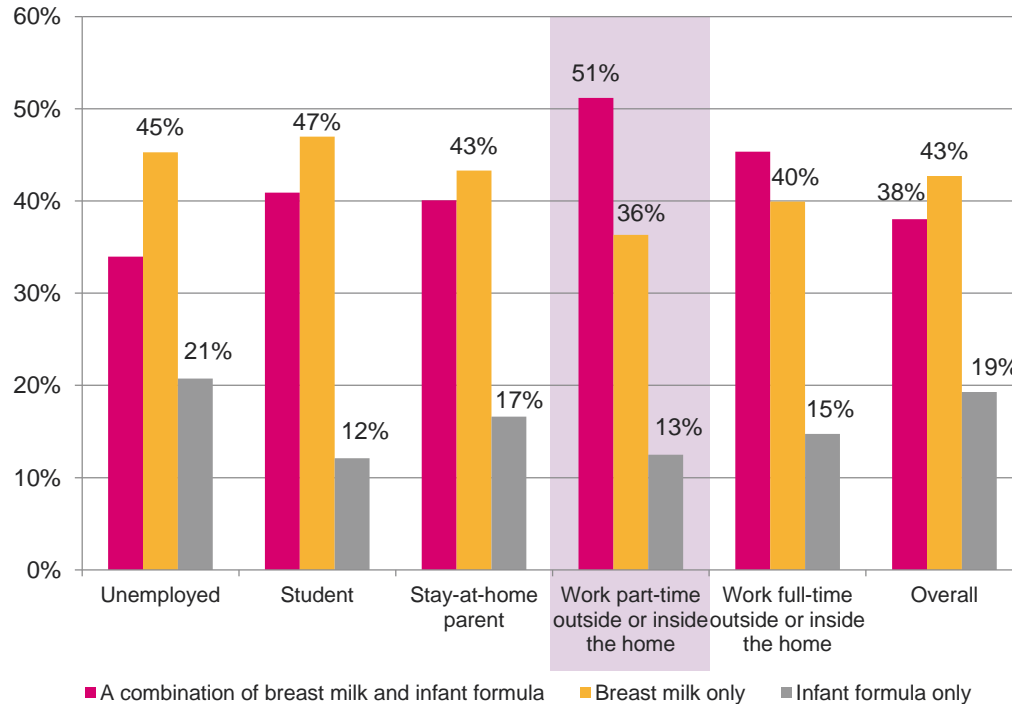


5 = Very Positive, 4 = Positive, 3 = Neutral, 2 = Negative, 1 = Very Negative

Feeding by Education

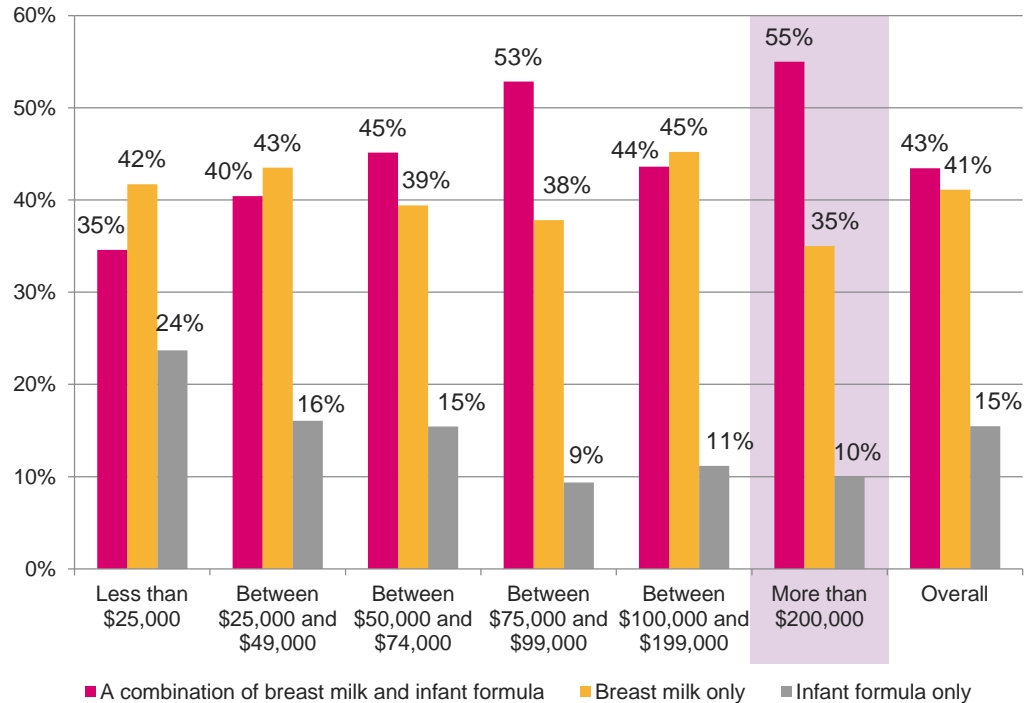


Feeding By Employment Status



- Working full or part time means a family is more likely to use combination feeding.
- Parents who identified as a student or unemployed were more likely to use breast milk only.
- Respondents who identified as a stay-at-home parent were not more or less unlikely to use breast milk or infant formula when compared to the average.
- **Parents who work, either part time or full time use infant formula at a higher rate than the other work status groups.** Those that identify as working part time have the highest need for flexibility and utilize combination feeding more than the other work status groups. Parents who identify as unemployed or a student are more likely to say they exclusively breastfeed.

Feeding By Income



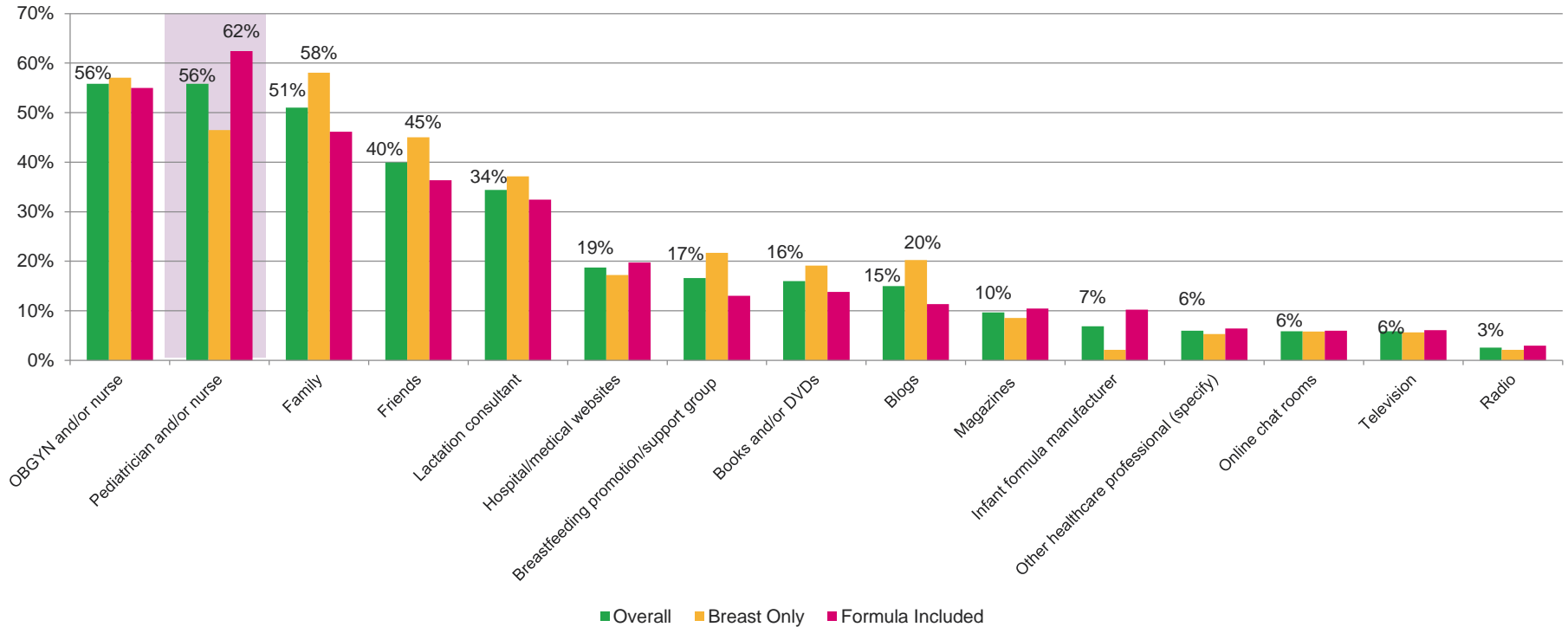
- **As income increased infant formula use went down, but only until income reached \$99k. After that infant formula use started increasing, but it was still lower than the overall average.**
- Combination feeding parents were most likely to have incomes in the \$75-\$99k and \$200k+ ranges.
- Breastfeeding only parents were more likely to have incomes in the \$50-\$74k and \$100-\$199k ranges.
- Infant formula only parents were more likely to have incomes under \$49k.



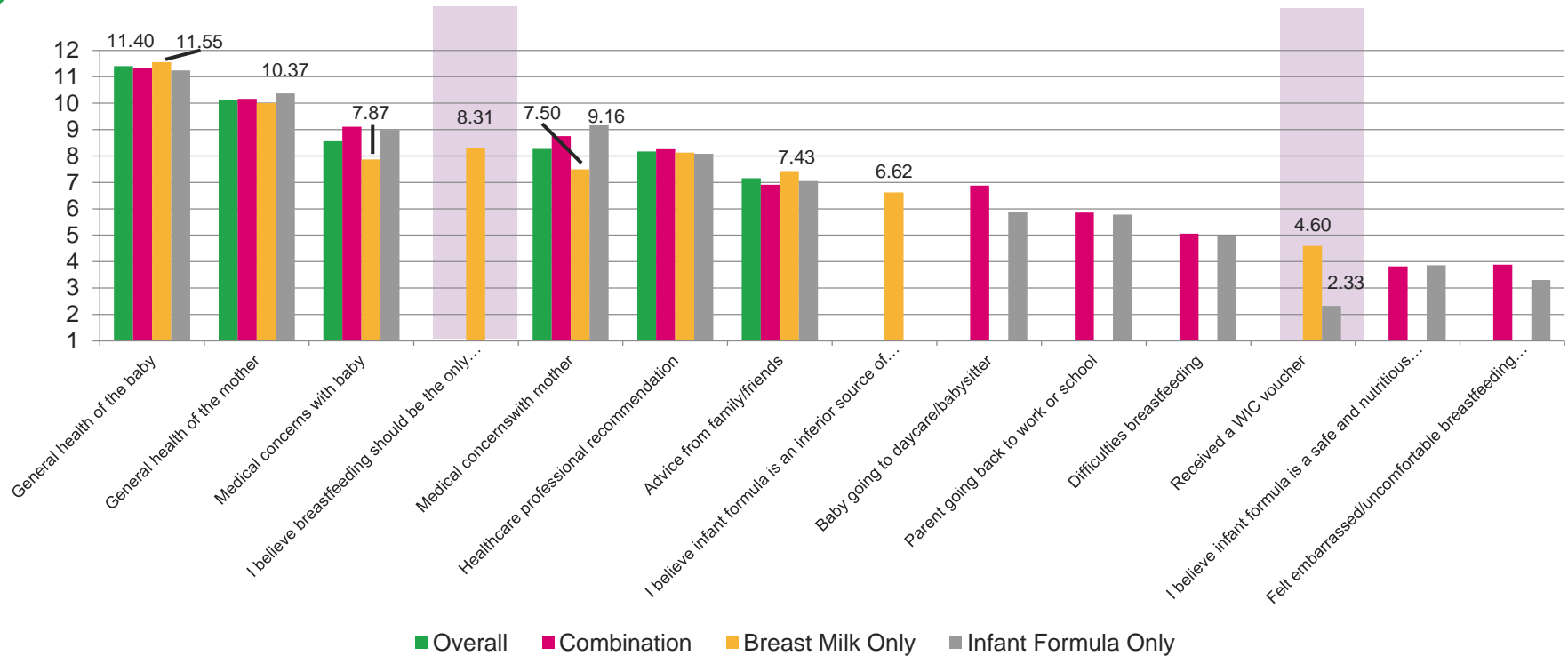
APPENDIX

INCA Modern Parenthood Survey | Summer 2015

Information Source By Feeding Option

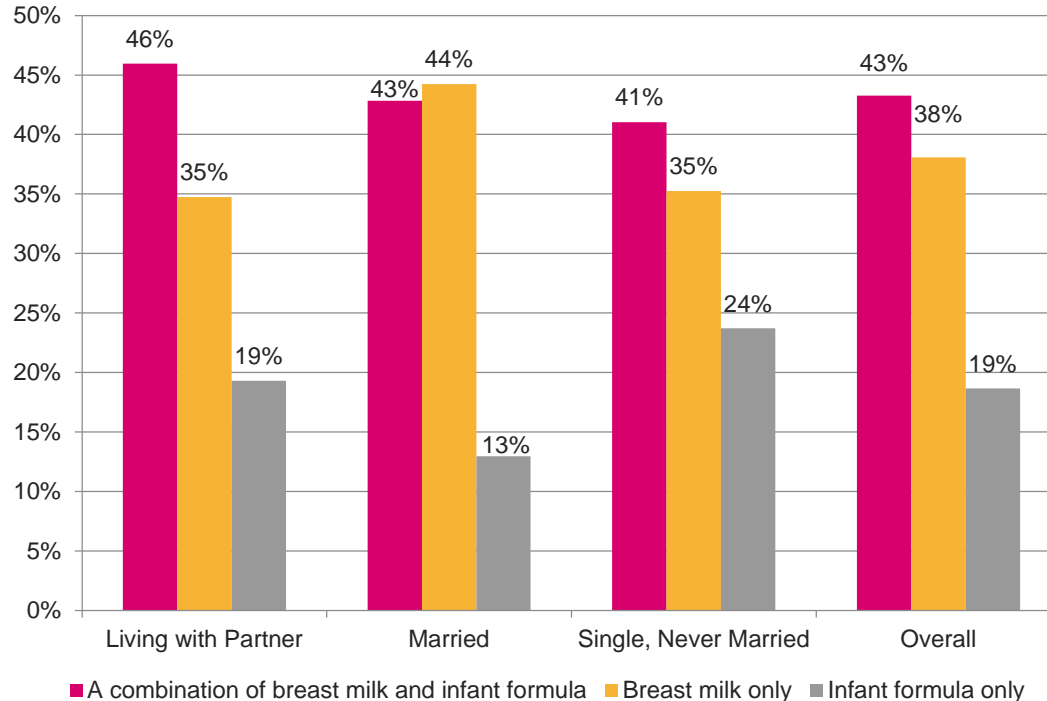


Decision Criteria By Feeding Option



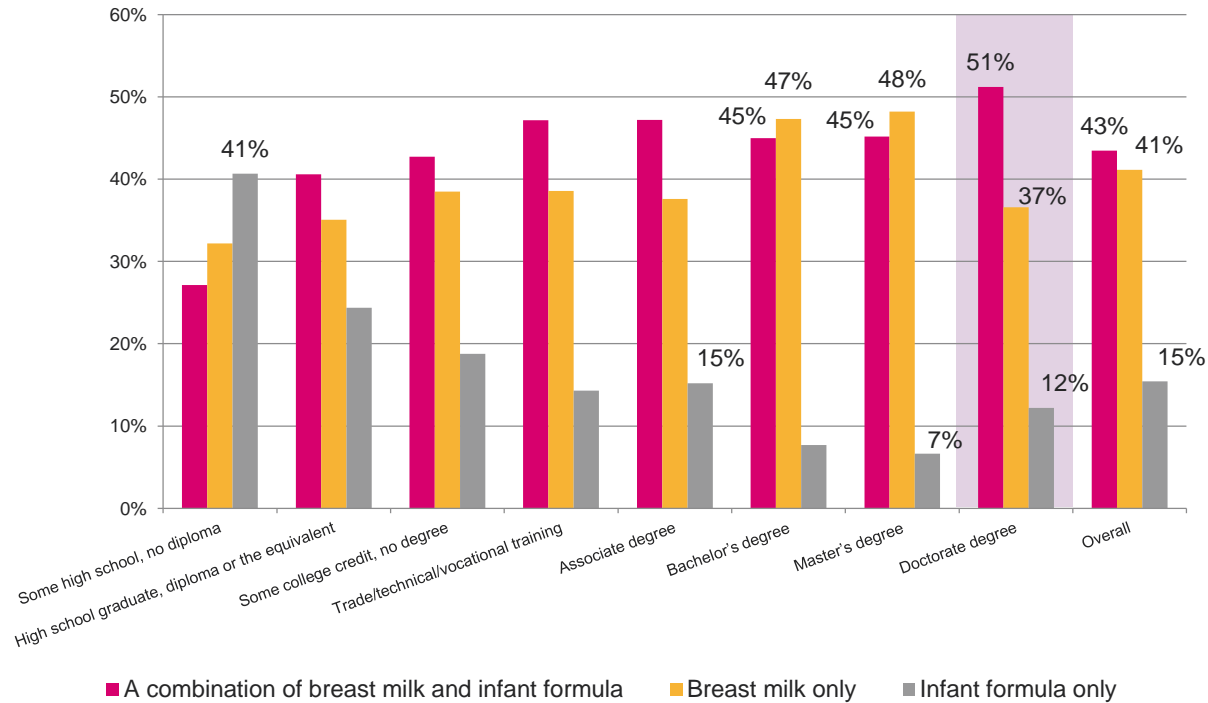
12 = Most Important, 7/6 = Neutral, 1= Least Important

Feeding By Marital Status



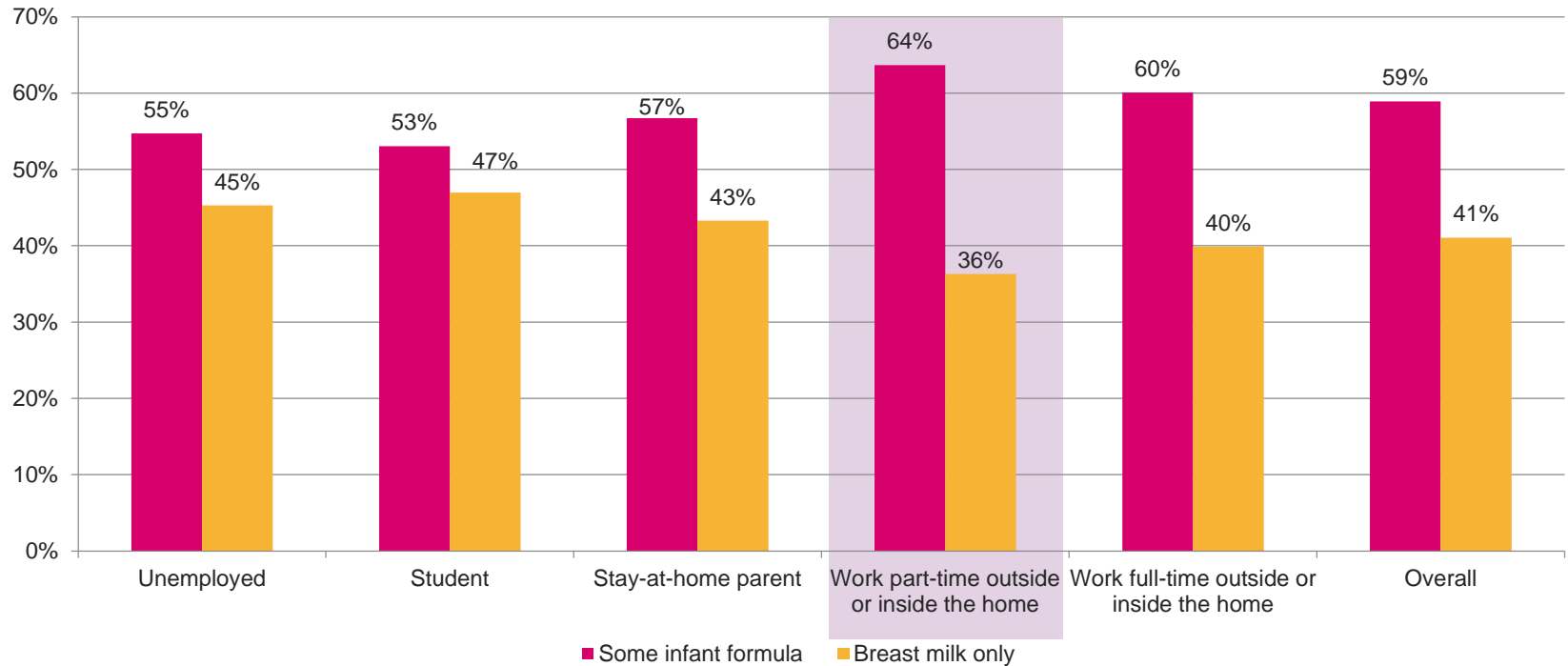
- Married parents were more likely to say they exclusively breastfed (44 percent vs. overall average of 38 percent) and less likely to use infant formula exclusively, but otherwise the numbers were generally the same across the different groups.
- **Those who said they lived with their partner were slightly more likely to use combo feeding (46 percent vs. overall average of 43 percent).**
- Parents who said they were single were more likely to use infant formula only (25 percent vs. overall average of 19 percent).

Feeding By Education

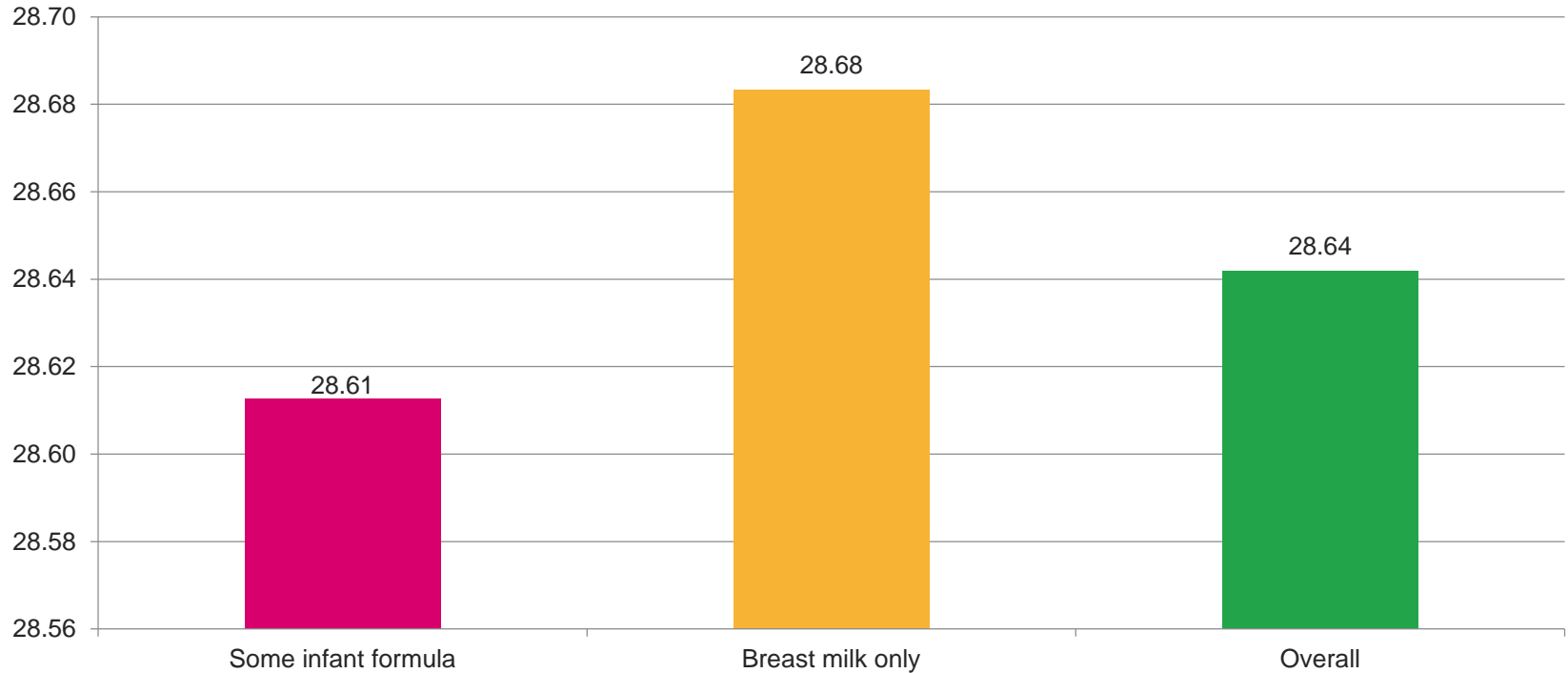


- In general, as education increases infant formula use decreases, but only until the point of a bachelor's degree. **Once a person has a bachelor's degree or higher they are more likely to use some amount of infant formula.**
- The higher a person's education the more likely they are to breastfeed with the exception of a doctorate's degree.
- Combination feeding also increased as education increased, but like exclusive breastfeeding, only until the point of a bachelor's degree. Then a family is more likely to use some amount of infant formula.
- **Our survey suggests a lower breastfeeding rate isn't about lack of education on the matter, but rather about time management and flexibility.**

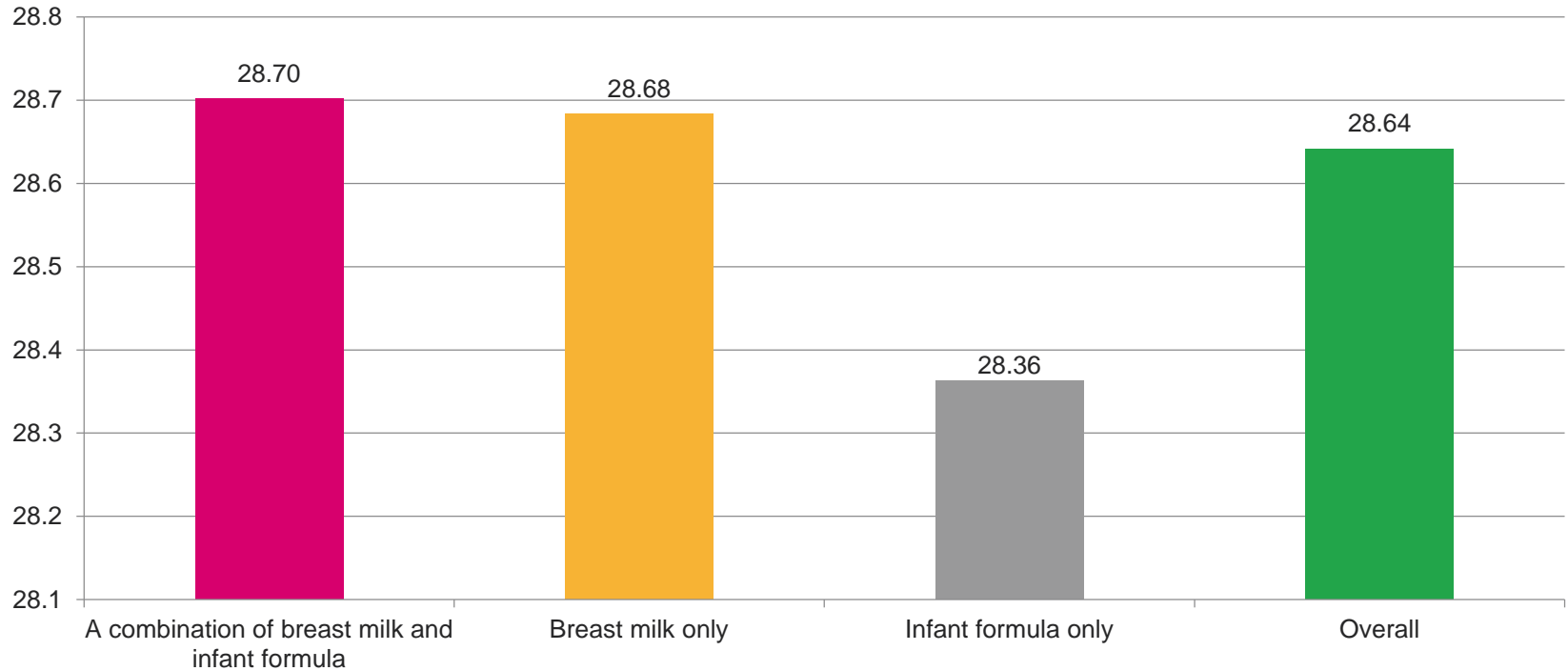
Some Formula vs. Breast Only – By Employment Status



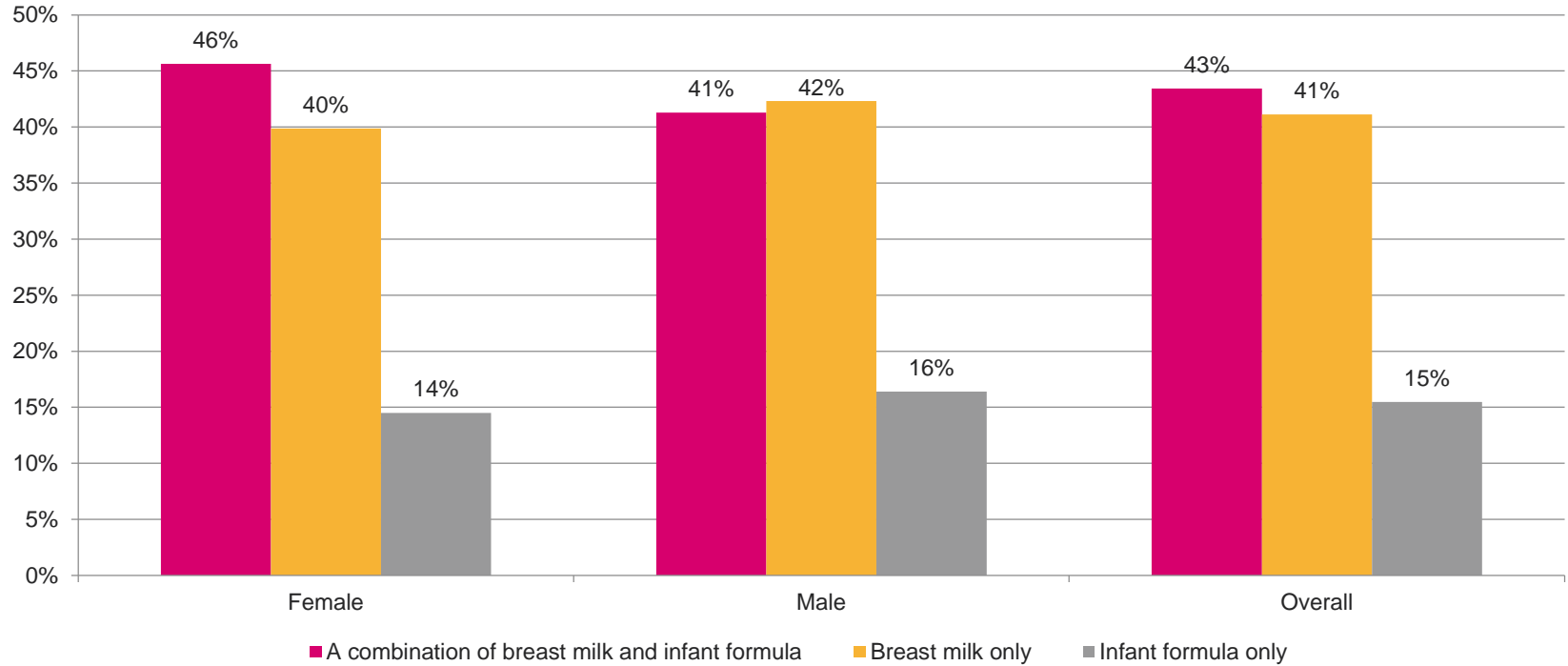
Some Formula vs. Breast Only – By Average Age



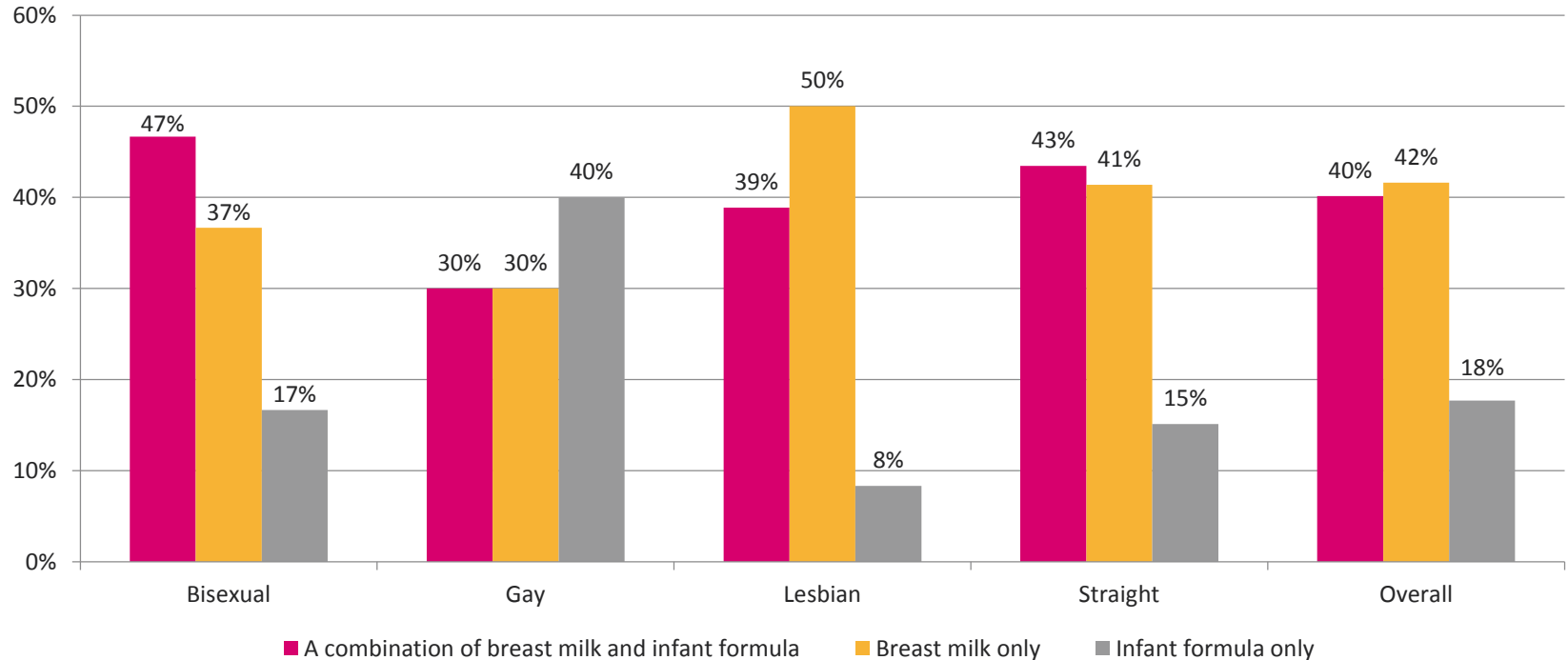
Feeding By Average Age



Feeding By Gender

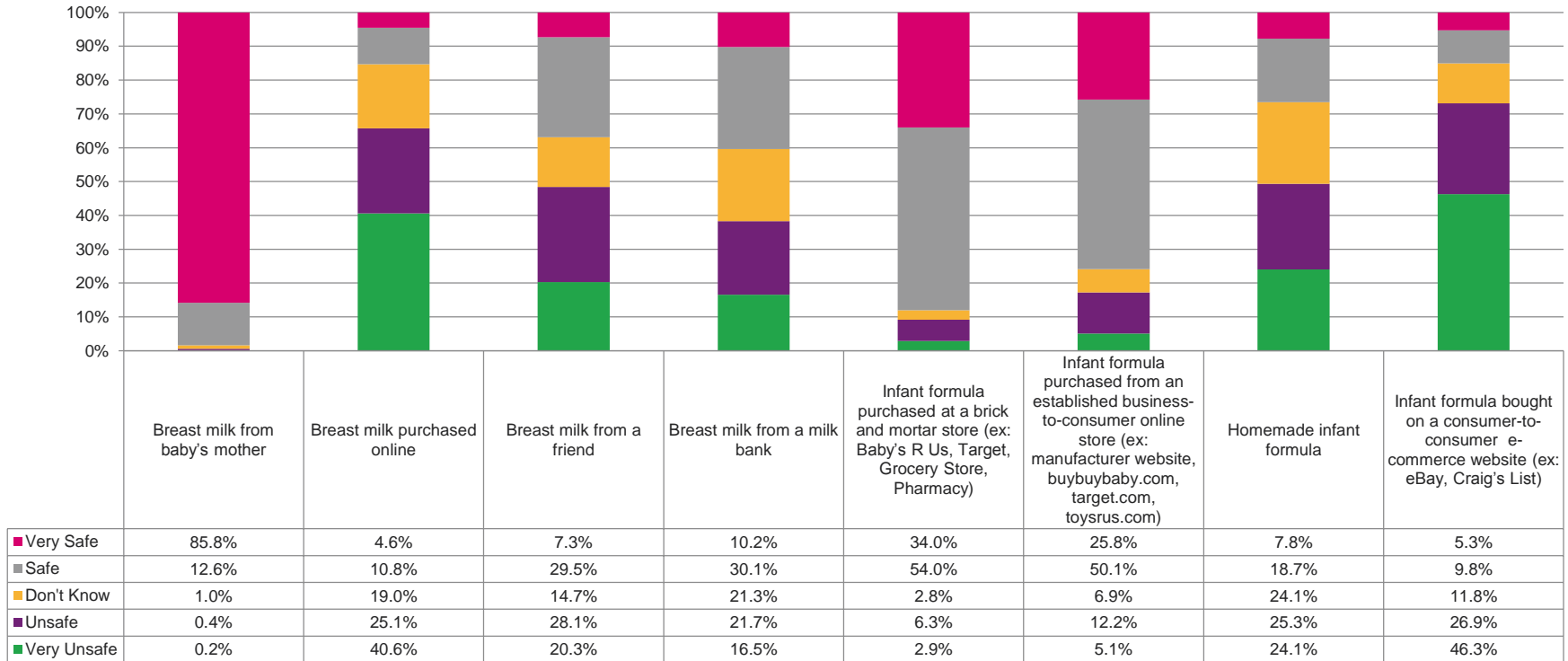


Feeding By Sexual Orientation*

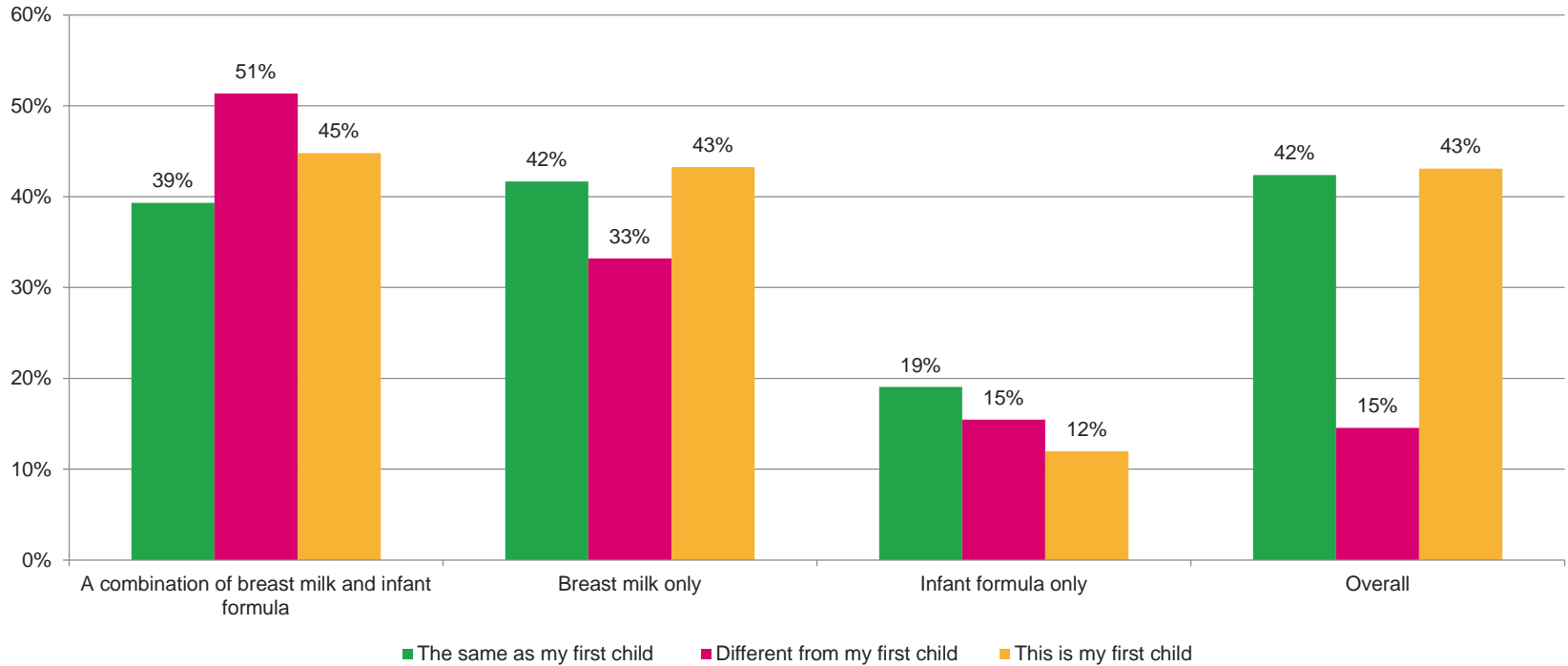


*Out of 1,513 respondents, 176 identified as other than straight, which is too small a sample size to use this data publicly.

Perceived Safety of Feeding Methods/Sources



Second Child Feeding Option



CONTACT US

Atlanta

1100 Johnson Ferry Road
Suite 300
Atlanta, GA 30342
Phone: (404) 252-3663
Fax: (404) 252-0774

Beijing

11/F, R.1177, Block A
Gateway Plaza
No.18 Xiaguangli
North Road, East Third Ring
Chaoyang District
Beijing, 100027 China
Phone: +86 10 59231096
Fax: +86 10 59231090

Brussels

Avenue Jules Bordetlaan 142,
1140 Brussels, Belgium
Phone: +32 2 761 16 00
Fax: +32 2 761 16 99

Chicago

Phone: 630-696-4000
Fax: 630-544-5055

Denver

10200 W. 44th Avenue, Suite 304
Wheat Ridge, CO 80033
Phone: 720-881-6100
Fax: (720) 881-6101

New York

355 Lexington Avenue
15th Floor
New York, NY 10017
Phone: (212) 297-2122
Fax: (212) 370-9047

Washington D.C.

National Press Building
529 14th Street, NW
Suite 750
Washington, DC 20045
Phone: (202) 591-2438
Fax: (202) 223-9741



[HTTP://WWW.FACEBOOK.COM/KELLENCOMPANY](http://www.facebook.com/kellencompany)



[HTTP://WWW.LINKEDIN.COM/COMPANY/KELLEN-COMPANY](http://www.linkedin.com/company/kellen-company)



[HTTP://KELLENCOMPANY.COM](http://kellencompany.com)



[HTTP://TWITTER.COM/KELLENCOMPANY](http://twitter.com/kellencompany)