

# Food Labeling Poll

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Wednesday, July 11, 2007

## **Key Findings:**

- **92 percent of Americans agree that imported foods should be labeled by their country of origin.**
- **88 percent of consumers expect that meat labeled “natural” comes from animals that were raised on a natural diet without drugs, chemicals or other artificial ingredients.**
- **90 percent of consumers agree that “organic” fish should be produced without environmental pollution and be free-of or low-in contaminants like mercury and PCBs.**

# Methodology

- ◆ Telephone surveys were conducted among 1,004 random adults comprising 502 men and 502 women 18 years of age and older. Interviewing took place over June 7-10, 2007.
- ◆ The questionnaire was fielded via Opinion Research Corporation's Caravan twice-weekly national telephone omnibus survey. ORC used random digit dialing to achieve a nationally representative probability sample and weighted completed interviews by age, sex, geographic region and race.
- ◆ The behavioral questions in the survey spanned preferences and expectations for natural/organic food, concern with food-related issues, and safety of the nation's food supply.
- ◆ The results of this study are intended for external communications. Methodology statement for public release:

The Consumer Reports National Research Center conducted a telephone survey using a nationally representative probability sample of telephone households. 1,004 interviews were completed among adults aged 18+. Interviewing took place over June 7-10, 2007. The sampling error is +/- 3.2% at a 95% confidence level.

# Responsibility for Food-Shopping

- ◆ Half of respondents have primary responsibility for the household food-shopping.
- ◆ Women, and consumers with income under \$40,000, aged 35+ years, or residing in the Northeast were most likely to be the primary shopper.

**INTRODUCTION:**

SF - Do you have primary or equally shared responsibility for food shopping for your household?

**Food-Shopping Responsibility**

	Gender		Age			Household Income			Region			
	Men	Women	18-34	35-54	55+	<\$40K	\$40-74K	\$75K+	NE	NCntrl	South	West
Primary responsibility for food shopping	38	63	34	58	58	61	44	45	57	52	48	49
Equal responsibility for food shopping	45	30	48	35	30	28	46	43	34	36	37	42
No responsibility for food shopping	17	6	17	7	11	10	10	11	9	12	13	8
<b>TOTAL</b>	<b>51</b>	<b>37</b>	<b>11</b>	<b>38</b>	<b>45</b>	<b>17</b>	<b>63</b>	<b>30</b>	<b>34</b>	<b>36</b>	<b>13</b>	<b>8</b>

# Natural/Organic Purchase Frequency

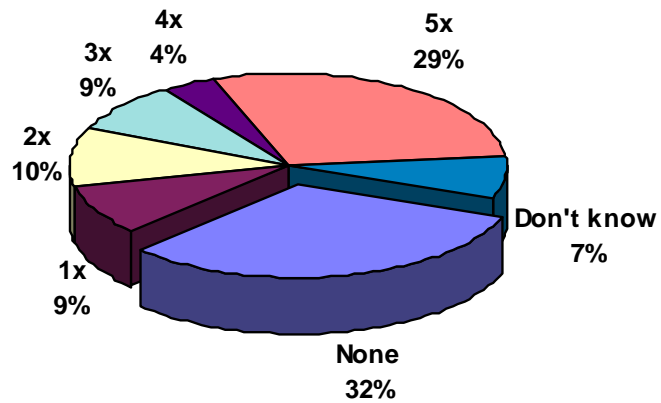
- ◆ **Consumers are frequent purchasers of “natural” or “organic” food items. On their last five trips to the grocery store, 61% bought an item labeled “natural” or “organic” at least once, and 29% did so on all five trips.**
  - **Women were far more likely than men to buy “natural” or “organic” products on one or more grocery trips (66% vs. 55%).**
  - **The same was true of high-income consumers relative to others: 70% of those earning at least \$75,000 purchased “natural” or “organic” at least once, compared with 58% of consumers reporting income under \$75,000.**
  - **Behavior also differed regionally: Westerners were most likely to choose “natural” or “organic” products (67%), while residents of the North Central region were least likely (55%).**
  
- ◆ **Overall, consumers purchased “natural” or “organic” food items on nearly half of their last five grocery excursions—an average of 2.3 times.**
  - **Young consumers and those with the highest income registered the greatest frequency—an average of 2.6 times.**
  - **Those aged 55+ years and residents of the North Central region bought an average of 2.0 times during the last five trips.**

**INTRODUCTION:**

**C1 - Thinking of your last five grocery trips, on how many of these did you buy something labeled natural or organic?**

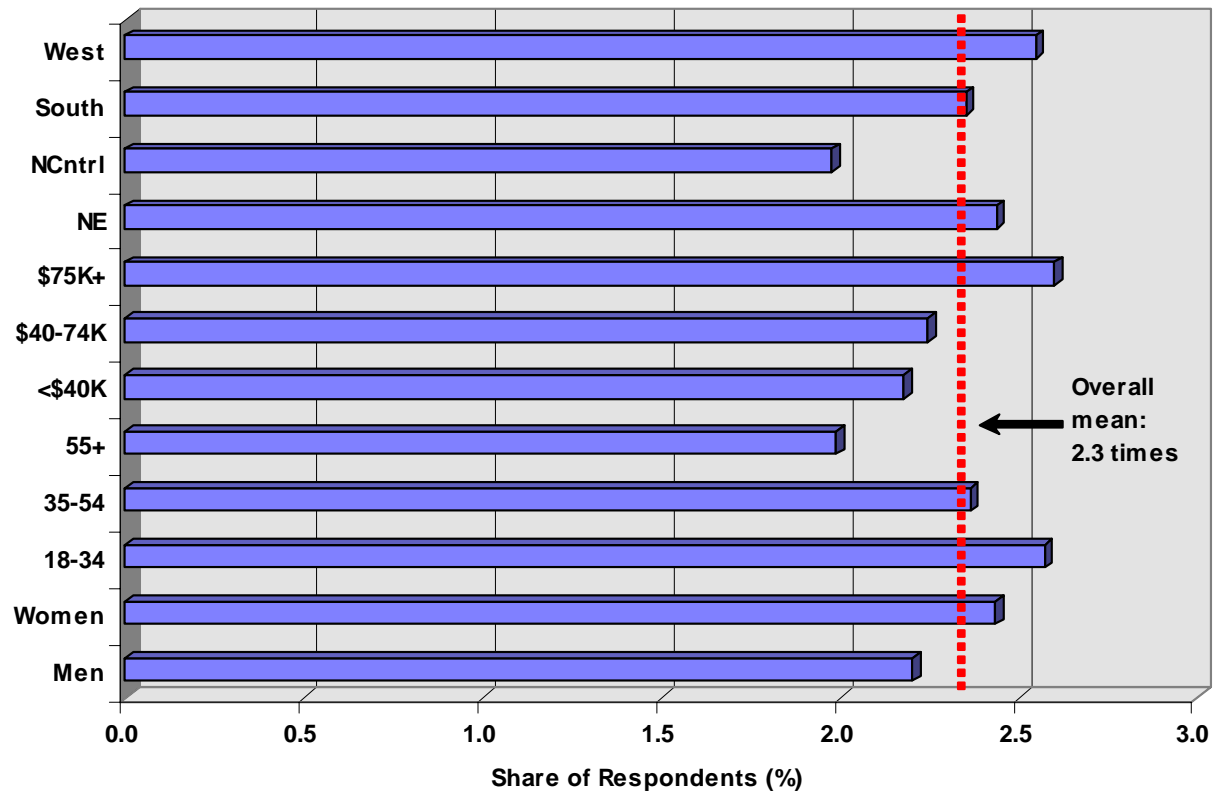
**Purchased Natural or Organic**

*No. times, past 5 grocery trips*



## Purchased Natural or Organic, Past 5 Grocery Trips

*Mean number of times*



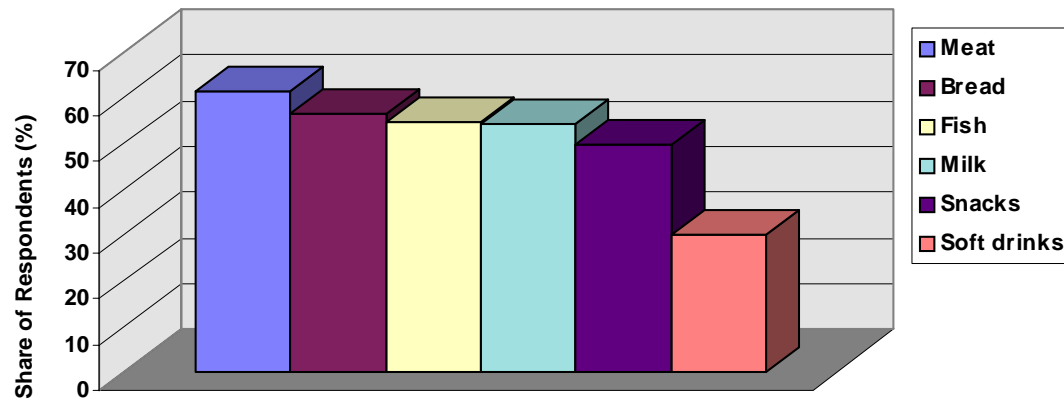
# Importance of Natural/Organic Label

- ◆ Consumers assigned high importance to a “natural” or “organic” label when buying food. Half or more said the label is *very* or *somewhat important* (top-two box of four boxes) in five categories:
  - Meat (61%)
  - Bread (57%)
  - Fish (55%)
  - Milk (54%)
  - Snacks (50%)
  
- ◆ “Natural” or “organic” soft drinks had the lowest importance at 30%.
  
- ◆ Importance averaged across all six categories was highest in two segments:
  - Women (54% vs. 48% for men)
  - Income <\$40,000 (59% vs. 47% for income \$40,000+)
  
- ◆ Women were particularly sensitive to labels with these categories:
  - Snacks (55% vs. 44% for men)
  - Fish (59% vs. 50% for men)

**INTRODUCTION:**

How important is it to you to buy [CATEGORY] labeled natural or organic? Would you say very important, somewhat important, somewhat unimportant or very unimportant?

**Top-Two Box: Importance of Natural/Organic Label**  
*Very/somewhat important*



# Natural/Organic Food Preferences

- ◆ **Labels communicate essential information about products and help consumers to make informed choices. According to the poll, foods that are labeled as “natural” or “organic”, or as free of disease or hormones, are highly popular, but consumers will avoid irradiated meat.**
  - **More than 6 in 10 consumers would buy food labeled “natural” (63%), or meat expressly tested for mad cow disease (62%).**
  - **More than half would purchase milk labeled free of synthetic bovine growth hormone (55%), or “organic” seafood (53%).**
  - **Under one-third of consumers (29%) would purchase meat that they knew to be irradiated.**
  
- ◆ **With most categories, affinity for clearly labeled food increased with income. The income effect was strongest milk labeled hormone-free: Consumers earning at least \$75,000 were 30% more likely than those earning under \$40,000 to purchase this type of milk.**
  
- ◆ **In some cases, specially designated food products that appear to be more healthful than conventional types actually may not have an advantage.**
  - **The “natural” label is not necessarily meaningful, and there are only weak standards defined by the government.**
  - **In addition, the “organic” label is meaningless with seafood. Consequently, consumers who seek out fish or shellfish bearing an “organic” label are being misled to believe that the food satisfies the requirements applied to “organic” farm products.**

**C3ALL - Which of the following food types would you buy if they were available?**

	TOTAL %	Gender		Age			Household Income			Region			
		Men %	Women %	18-34 %	35-54 %	55+ %	<\$40K %	\$40-74K %	\$75K+ %	NE %	NCntrl %	South %	West %
Food, such as bread or soft drinks labeled natural	63	63	64	68	62	62	66	65	66	65	65	63	61
Meat labeled tested for mad cow disease	62	62	63	66	66	55	53	73	66	64	64	59	66
Milk labeled without synthetic bovine growth hormone	55	52	57	55	61	47	48	56	63	53	59	49	61
Fish or shellfish labeled organic	53	50	55	52	55	50	49	53	60	52	54	49	58
Meat labeled irradiated	29	30	28	31	32	24	23	36	30	25	34	26	32
None of these	9	9	9	7	9	11	9	9	6	10	9	9	8

# Concern With Food-Related Issues

- ◆ More than 6 in 10 consumers expressed concern with all tested issues relating to food safety or purity. Concern was high across gender, age, income and region.
  
- ◆ Three issues registered the most concern (top-two box = *very/somewhat concerned*):
  - Bacteria or chemicals in food (87%)
  - Poor hygiene standards for farmed animals (83%)
  - Food animals that are raised with daily antibiotics, other drugs or pesticides (82%)
  
- ◆ Three-quarters of consumers expressed concern with:
  - Foods labeled natural that contain artificial ingredients like trans fats or high-fructose corn syrup (76%)
  - Dairy cows given synthetic growth hormones (76%)
  - Chicken coop waste used in cattle feed (76%)
  - Ocean pollution caused by fish farms advertised as organic (76%)
  
- ◆ The lowest-scoring Issues still elicited concern among a strong majority:
  - Eating meat or milk products from cloned animals (69%)
  - Sale of irradiated foods (69%)
  - Genetic engineering of food crops to produce drugs, such as insulin (69%)

**INTRODUCTION:**

I will read you several issues that may or may not be relevant to you. For each issue, please indicate whether you are very concerned, somewhat concerned, a little concerned or not concerned at all.

**C4A-J All - Top-Two Box: Concern With Issues**

[4 boxes: Very Concerned/Somewhat Concerned/A Little Concerned/Not Concerned At All]

	TOTAL	Gender		Age			Household Income			Region			
		Men	Women	18-34	35-54	55+	<\$40K	\$40-74K	\$75K+	NE	NCntrl	South	West
	%	%	%	%	%	%	%	%	%	%	%	%	%
Bacteria or chemicals in food	87	83	90	85	93	82	84	91	88	90	89	84	87
Poor hygiene standards for farmed animals	83	76	89	78	85	85	83	87	83	88	84	78	86
Food animals that are raised with daily antibiotics, other drugs or pesticides	82	75	88	79	86	80	85	81	82	82	82	81	83
Foods labeled natural that contain artificial ingredients like trans fats or high fructose corn syrup	76	70	82	72	81	75	76	77	79	79	75	73	80
Dairy cows given synthetic growth hormones	76	70	82	69	82	76	75	80	76	78	78	75	74
Chicken coop waste used in cattle feed	76	69	81	67	81	78	76	80	74	81	77	73	74
Ocean pollution caused by fish farms advertised as organic	74	65	82	73	76	72	77	74	74	75	71	75	74
Eating meat or milk products from cloned animals	69	61	77	68	75	64	75	72	66	71	70	70	67
Sale of irradiated foods	64	59	68	57	68	65	68	63	59	71	68	59	60
Genetic engineering of food crops to produce drugs, such as insulin	62	56	67	59	67	58	68	64	53	62	65	61	61

# Food-Labeling Protections

- ◆ **Around 9 in 10 consumers agreed with the five statements that would strengthen labeling requirements (top-two box = *strongly/somewhat agree*):**
  - **Imported foods should be labeled by their country of origin (92%)**
  - **Fish labeled organic should be produced without environmental pollution and be free of or low in contaminants like mercury and PCBs (91%)**
  - **Meat companies should be allowed to test and label meat products as tested for mad cow disease (90%)**
  - **Meat and dairy products from cloned animals should be labeled as such (89%)**
  - **Milk from cows raised without synthetic bovine growth hormone should be allowed to be labeled as such (88%)**
  
- ◆ **Under half of respondents approved of diluting the “pasteurized” label to include irradiation:**
  - **Food that is irradiated should be allowed to be labeled pasteurized instead of irradiated (46%)**
  
- ◆ **Sentiment in favor of strict labeling requirements was firm across all demographic segments.**

**INTRODUCTION:**

For each of the following statements, please indicate whether you strongly agree, somewhat agree, somewhat disagree or strongly disagree.

**C5A-F All - Top-Two Box: Agreement With Statements**  
**[4 boxes: Strongly Agree/Somewhat Agree/Somewhat Disagree/Strongly Disagree]**

	TOTAL %	Gender		Age			Household Income			Region			
		Men %	Women %	18-34 %	35-54 %	55+ %	<\$40K %	\$40-74K %	\$75K+ %	NE %	NCntrl %	South %	West %
Imported foods should be labeled by their country of origin	92	93	91	92	92	94	90	92	97	88	94	93	93
Fish labeled organic should be produced without environmental pollution and be free of or low in contaminants like mercury and PCBs	91	89	93	94	94	87	89	92	96	91	92	92	90
Meat companies should be allowed to test and label meat products as tested for mad cow disease	90	88	92	92	91	89	89	94	92	89	92	90	91
Meat and dairy products from cloned animals should be labeled as such	89	86	91	91	89	87	88	90	89	87	90	88	89
Milk from cows raised without synthetic bovine growth hormone should be allowed to be labeled as such	88	85	91	87	91	85	86	90	93	88	88	87	90
Food that is irradiated should be allowed to be labeled pasteurized instead of irradiated	46	44	48	47	48	44	49	45	47	43	47	50	42

# Meat Label Expectations

- ◆ With meat, consumers have high expectations of the “natural” label, and this was true regardless of gender, age, income or region. More than 8 in 10 said the “natural” label on meat should mean:
  - It came from an animal whose diet was natural and free of chemicals, drugs and other artificial ingredients (89%)
  - No artificial colorings or other ingredients were used in the cut of the meat or meat product (84%)
  - It came from an animal that was raised in a natural environment (83%)
  
- ◆ A strong majority of consumers expressed sensitivity to brine in “natural” meat:
  - No salt water was added to the meat (70%)

C6ALL - Do you think that the natural label on MEAT should mean...

	TOTAL %	Gender		Age			Household Income			Region			
		Men %	Women %	18-34 %	35-54 %	55+ %	<\$40K %	\$40-74K %	\$75K+ %	NE %	NCntrl %	South %	West %
It came from an animal whose diet was natural and free of chemicals, drugs and other artificial ingredients	88	85	90	90	87	87	88	88	88	86	91	86	89
No artificial colorings or other ingredients were used in the cut of the meat or meat product	84	84	84	85	86	81	83	84	86	82	86	83	86
It came from an animal that was raised in a natural environment	83	81	85	83	83	83	87	84	80	85	84	82	82
No salt water was added to the meat	70	66	73	63	71	75	74	71	62	74	75	65	68
None of these	3	3	3	2	3	3	4	1	2	2	2	3	3

# Packaged-Food Label Expectations

- ◆ Consumers also expect a lot of packaged foods labeled “natural”. More than 8 in 10 said the “natural” label on these items should mean:
  - No artificial colorings, additives or preservatives were used (86%)
  - All ingredients included occur naturally or in nature (85%)
  - It does not contain artificial oils or sugars like partially hydrogenated oils or high-fructose corn syrup (83%)
  - Only sugars that occur naturally were used (81%)

C7ALL - Do you think that the natural label on PACKAGED FOOD should mean...

	TOTAL %	Gender		Age			Household Income			Region			
		Men %	Women %	18-34 %	35-54 %	55+ %	<\$40K %	\$40-74K %	\$75K+ %	NE %	NCntrl %	South %	West %
No artificial colorings, additives or preservatives were used	86	86	86	88	87	84	85	87	87	84	87	86	88
All ingredients included occur naturally or in nature	85	83	87	84	87	85	87	85	85	83	85	88	84
It does not contain artificial oils or sugars like partially hydrogenated oils or high-fructose corn syrup	83	81	86	82	87	81	83	87	84	85	85	82	82
Only sugars that occur naturally were used	81	78	84	80	85	78	81	82	83	82	83	80	81
None of these	3	3	2	2	2	3	2	3	1	1	3	3	3

# Profile

- ◆ **Women and men were equally represented in the poll, and the median age of respondents was 44 years.**
- ◆ **Nearly 4 in 10 consumers reported a four-year college degree or more, but a similar share had no education beyond high school.**
- ◆ **Median household income of the sample was about \$48,000, and nearly half said they are employed full time.**
- ◆ **Roughly half of respondents are married, and three in four are Caucasian.**

## Profile

	Gender		Age			Household Income			
	Men	Women	18-34	35-54	55+	<\$40K	\$40-74K	\$75K+	
<b>UNWEIGHTED BASE</b>	<b>1,004</b>	<b>502</b>	<b>502</b>	<b>193</b>	<b>360</b>	<b>441</b>	<b>317</b>	<b>240</b>	<b>232</b>
	%	%	%	%	%	%	%	%	%
<b><u>GENDER</u></b>									
Male	48	100		58	45	43	45	56	52
Female	52		100	42	55	57	55	44	48
<b><u>AGE</u></b>									
18-34	30	36	25	100			35	32	21
35-44	19	18	21		50		14	19	33
45-54	19	18	20		50		16	23	24
55-64	14	14	14			47	13	15	15
65+	16	13	19			53	21	11	6
Refused/Nr	1	1	1					0	0
MEDIAN (Years)	43.9	41.6	46.8	26.0	43.9	66.6	45.2	43.5	42.7
<b><u>EDUCATION</u></b>									
Some HS or less	7	6	8	7	6	9	13	4	2
HS graduate	32	31	32	39	27	30	42	33	14
Some college	23	24	22	24	23	22	27	28	17
College grad+ [Net]	37	37	37	28	44	37	17	34	67
College grad	24	24	23	21	27	22	12	22	42
Postgrad degree	13	12	14	6	17	15	5	12	26
Refused/Nr	1	1	1	2	1	2	1		
<b><u>HOUSEHOLD INCOME</u></b>									
Under \$25,000	19	18	20	23	13	24	50		
\$25,000 but less than \$50,000	30	29	32	31	28	33	50	41	
\$50,000 but less than \$75,000	17	20	14	21	15	15		59	
\$75,000 but less than \$100,000	10	10	11	6	16	7			38
\$100,000 or more	17	18	16	14	22	13			62
Refused	7	5	8	5	5	8			
MEDIAN (000s)	\$47.7	\$50.9	\$44.5	\$42.8	\$58.8	\$40.0	\$24.9	\$53.3	\$118.9

## Profile (cont.)

	Gender		Age			Household Income			
	TOTAL	Men	Women	18-34	35-54	55+	<\$40K	\$40-74K	\$75K+
	%	%	%	%	%	%	%	%	%
<b>UNWEIGHTED BASE</b>	1,004	502	502	193	360	441	317	240	232
<b><u>EMPLOYMENT</u></b>									
Employed full time	48	58	40	54	62	26	37	55	65
Employed part time	13	10	16	20	12	8	15	12	12
Retired	21	17	24	1	6	59	26	17	11
Not employed	18	15	20	26	20	7	22	16	12
Refused/Nr	0	0	0		1			1	
<b><u>MARITAL STATUS</u></b>									
Married	49	45	53	36	59	50	29	56	72
Living as married	3	4	2	6	2	1	6	3	2
Single and never been married	28	35	21	53	23	10	37	26	18
Divorced	10	9	11	2	12	16	16	11	5
Separated	2	1	2	0	3	2	3	1	1
Widowed	7	5	9	2	1	19	10	3	2
Refused/Nr	1	1	2	1	1	2	1	0	
<b><u>RACE</u></b>									
White/Caucasian	73	71	76	60	75	85	66	80	79
Black/African-American	12	14	10	14	12	9	16	10	8
Asian/Asian-American	2	2	2	2	2	1	1	2	4
Some other race	13	13	12	23	11	6	18	10	9
Refused/Nr	1	1	2	2	2	1	0		1
<b><u>REGION</u></b>									
Northeast	19	19	19	21	17	19	17	20	19
North Central	22	23	22	21	24	22	23	26	21
South	36	36	37	35	36	38	38	30	38
West	22	21	23	23	23	20	22	23	21