

CONSUMER REPORTS® NATIONAL RESEARCH CENTER
Survey Research Report

Food Labels Survey
2014 Nationally-Representative Phone Survey

Introduction

The consumer demand for more natural, environmentally friendly and socially-responsible food has proliferated. More than ever, consumers want to know exactly what is in their food; they are turning to food labels to provide this information. But can these labels be trusted? Questions remain about exactly what consumers know about food labeling, and the standards consumers want for food labeling.

In April, 2014, the Consumer Reports® National Research Center conducted a nationally representative phone survey to assess consumer opinion regarding the labeling of food (tables for all questions are included in the appendix). Opinion Research Corporation (ORC) of Princeton, New Jersey administered the survey to a nationally representative sample of 1,004 adult US residents (half of the respondents were women) through its CARAVAN Omnibus Survey. Respondents were selected by means of random-digit dialing and were interviewed via phone. The data were statistically weighted so that respondents in the survey were demographically and geographically representative of the US population. This report summarizes the findings from this survey.

Highlights

Consumers Are Looking for Natural and Locally Produced Food

- When shopping for food, two-thirds of Americans are checking to see if their food is locally produced; the majority of consumers (59%) are also checking to see if their food is natural.

Environmentally Conscious and Socially Responsible Food a Priority for Most Americans

- A range of environmental, safety and social concerns are imperative to most US consumers when purchasing food; the vast majority of consumers prioritize supporting local farmers, protecting the environment from chemicals, fair conditions for workers, reducing exposure to pesticides, good living conditions for animals, and reducing antibiotic use in food.

Consumer Mandate for Fair Wage and Working Conditions for Farm Workers

- Making sure that the workers that produced their food are treated fairly is important to US consumers and most are willing to put their money where their mouth is!

Consumers Want More Stringent Standards for Natural and Organic Labeling on Meat and Poultry

- The majority of consumers think that the natural or organic label on meat and poultry *currently* means that no artificial ingredients, growth hormones, genetically modified ingredients, or antibiotics were used; an even greater amount of consumers feel that this labeling *should* indicate this.

Consumers Demand More Standards for Natural and Organic Labels on Packaged and Processed Foods

- The majority of consumers think that the natural or organic label on packaged and processed foods *currently* means that no pesticides, artificial ingredients or chemicals, or genetically modified ingredients were used; an even greater amount of consumers feel that this labeling *should* indicate this.

Consumers Have High Expectations for Humanely Raised Claims on Eggs, Dairy and Meat

- While only half of consumers think a humanely raised claim *currently* means that the animals were raised without cages, a clear majority of consumers (75%) think these claims *should* mean this.

Consumers Demand Information about Food Origin

- The overwhelming majority of consumers want food labels to reflect country of origin (92% of consumers) and state of origin (82%). In addition, an outstanding percentage of consumers (90%) want to know if their meat is from outside the US.

Consumers Demand Labeling of Meat Raised with Antibiotics

- If an animal was routinely given antibiotics, the vast majority of consumers (83%) demand that the government require that this meat be labeled as “raised with antibiotics.”

Consumer Mandate for Labeling and Strong Federal Safety Standards for Genetically Engineered Food

- An overwhelming majority of US consumers think that before genetically engineered food can be sold it must be labeled as such and meet government safety standards. Moreover, an outstanding percentage of Americans (92%) demand that the government require that genetically engineered salmon be labeled as such.

Consumers Skeptical about Labels on Seafood

- Most consumers who buy seafood (83%) have some doubt about the accuracy of labels on seafood at the fish counter.

Consumers Think Most Shrimp in US Farm Raised, Imported and Not Fresh

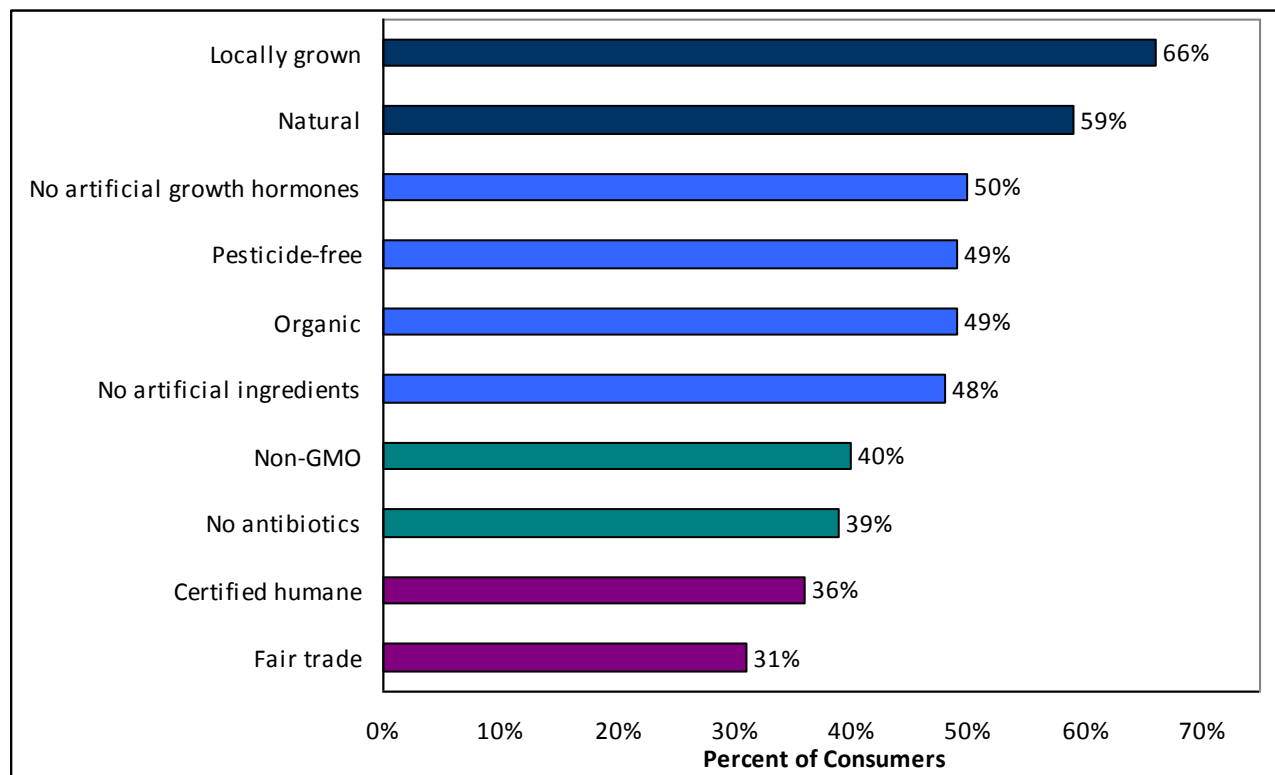
- The majority of consumers think that most of the shrimp in the US is farm raised and imported. In addition, most consumers believe that unfrozen shrimp at the store was originally frozen and then thawed.

Consumers Are Looking for Natural and Locally Produced Food

When shopping for food, two-thirds of Americans are checking to see if their food is locally produced; the majority of consumers (59%) are also checking to see if their food is natural.

Consumers are less likely to look for fair trade (31% of consumers), animal welfare (36%), antibiotic (39%) and non-GMO (40%) claims.

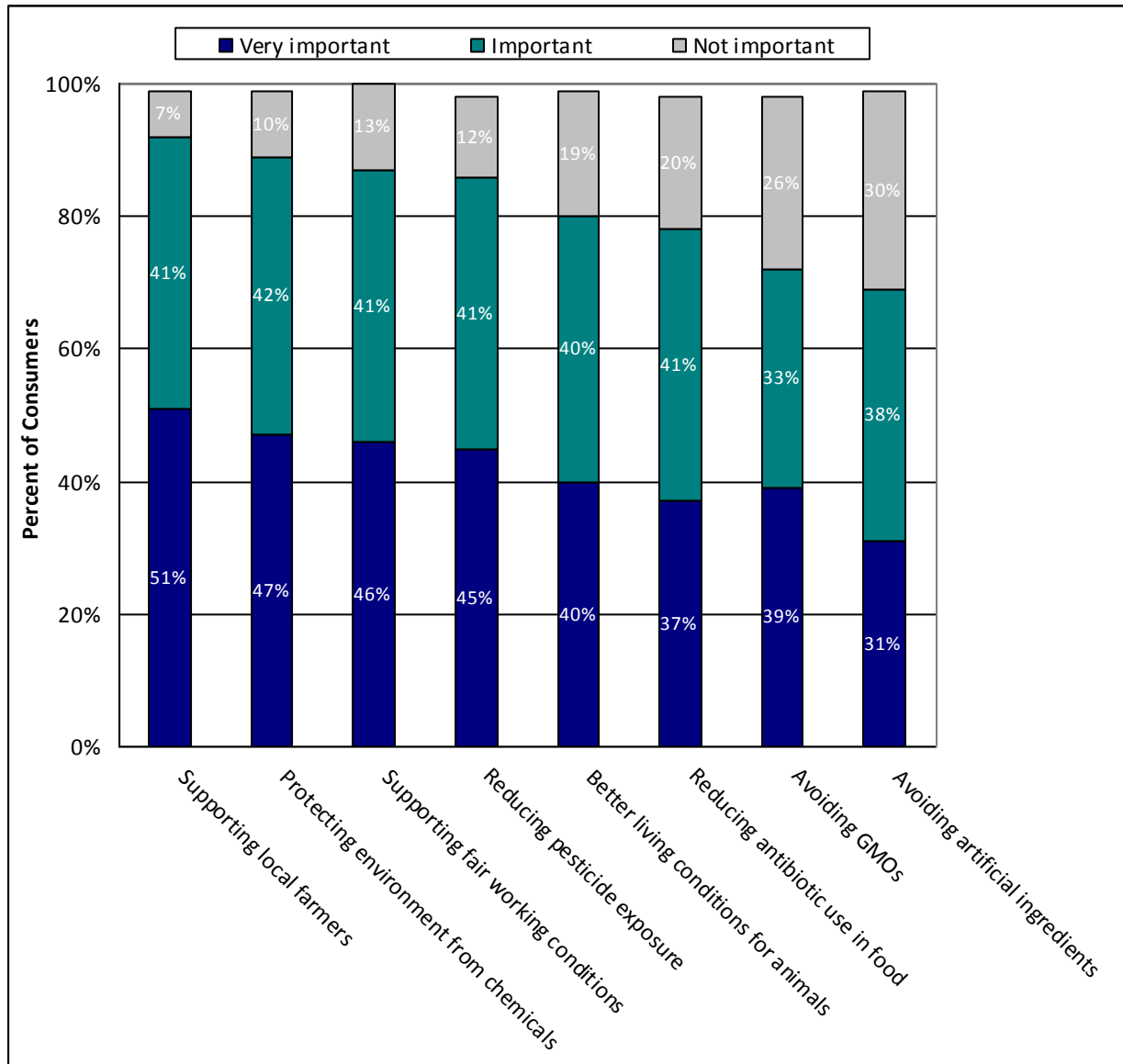
Claims Consumers Look for on Food Labels



Environmentally Conscious and Socially Responsible Food a Priority for Most Americans

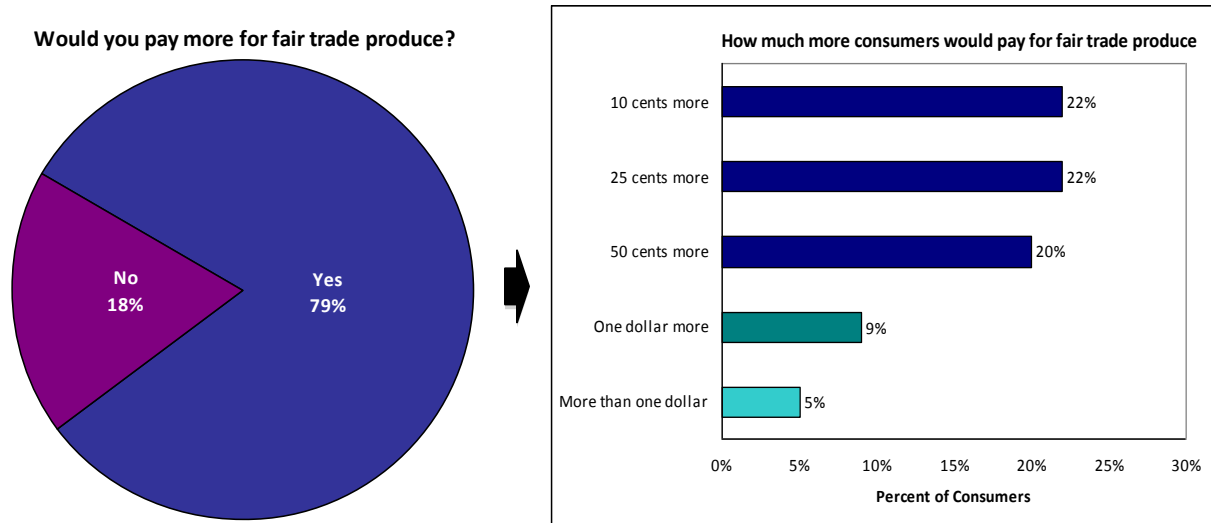
A range of environmental, safety and social concerns are imperative to most US consumers when purchasing food. For the overwhelming majority of consumers crucial (*very important or important*) objectives include supporting local farmers (92% of consumers), protecting the environment from chemicals (89%), fair conditions for workers (86%), reducing exposure to pesticides (87%), good living conditions for animals (80%), and reducing antibiotic use in food (78%). Avoiding GMOs (72% of consumers) and artificial ingredients (69%) are also crucial objectives for many consumers.

Importance of Objectives to Consumers



Consumer Mandate for Fair Wage and Working Conditions for Farm Workers

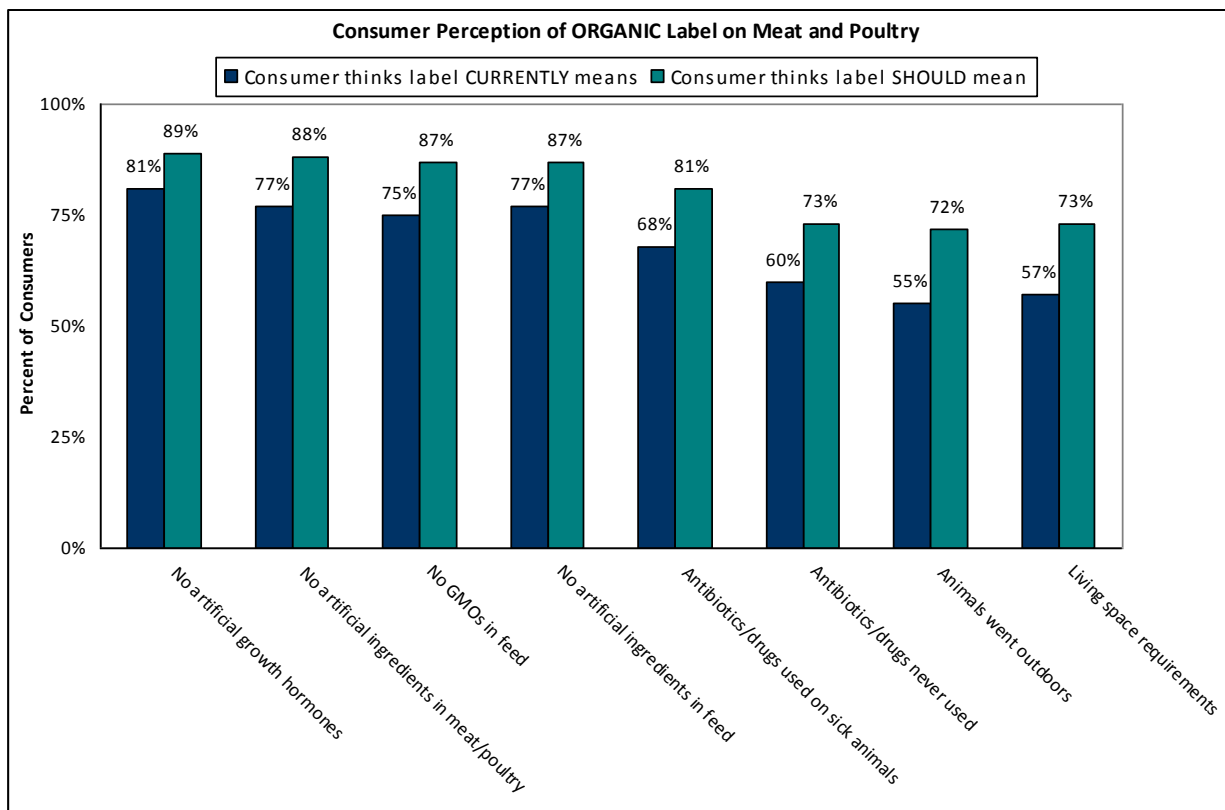
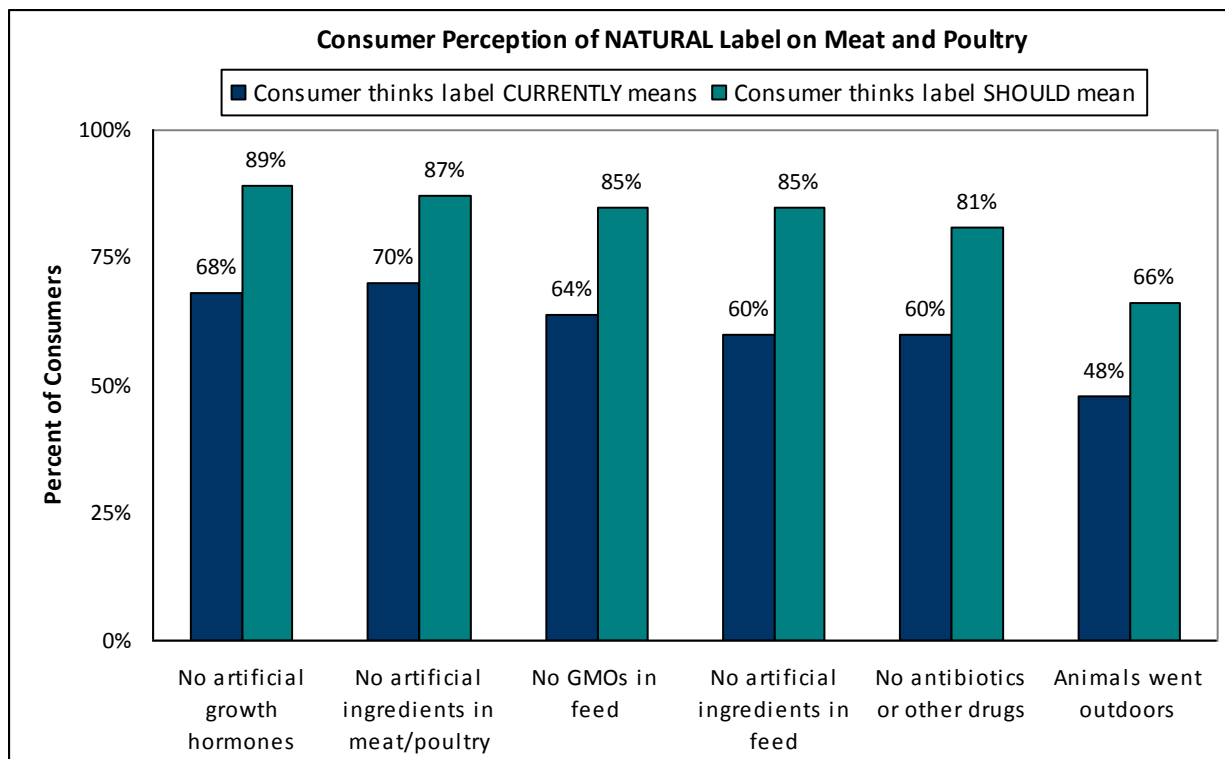
Making sure that the workers that produced their food are treated fairly is important to US consumers and most are willing to put their money where their mouth is! Most consumers (79%) will pay more for fruits and vegetables produced by workers under fair wage and working conditions; a sizable portion of consumers (34%) would even pay 50 cents or more per pound.



Consumers Want More Stringent Standards for Natural and Organic Labeling on Meat and Poultry

The majority of consumers think that the **natural** label on meat and poultry *currently* means that no artificial ingredients were added to the meat/poultry (70%), no growth hormones were used (68%), the animals' feed contained no GMOs (64%) or artificial ingredients (60%), and no antibiotics or other drugs were used (60%). Still, an even greater amount of consumers feel that this label *should* mean that no artificial ingredients were added to the meat/poultry (87%), no growth hormones were used (89%), the animals' feed contained no GMOs (85%) or artificial ingredients (85%), and no antibiotics or other drugs were used (81%). Moreover, while less than half of consumers think this label *currently* means that the animals went outdoors; the majority of consumers (66%) want this label to reflect this.

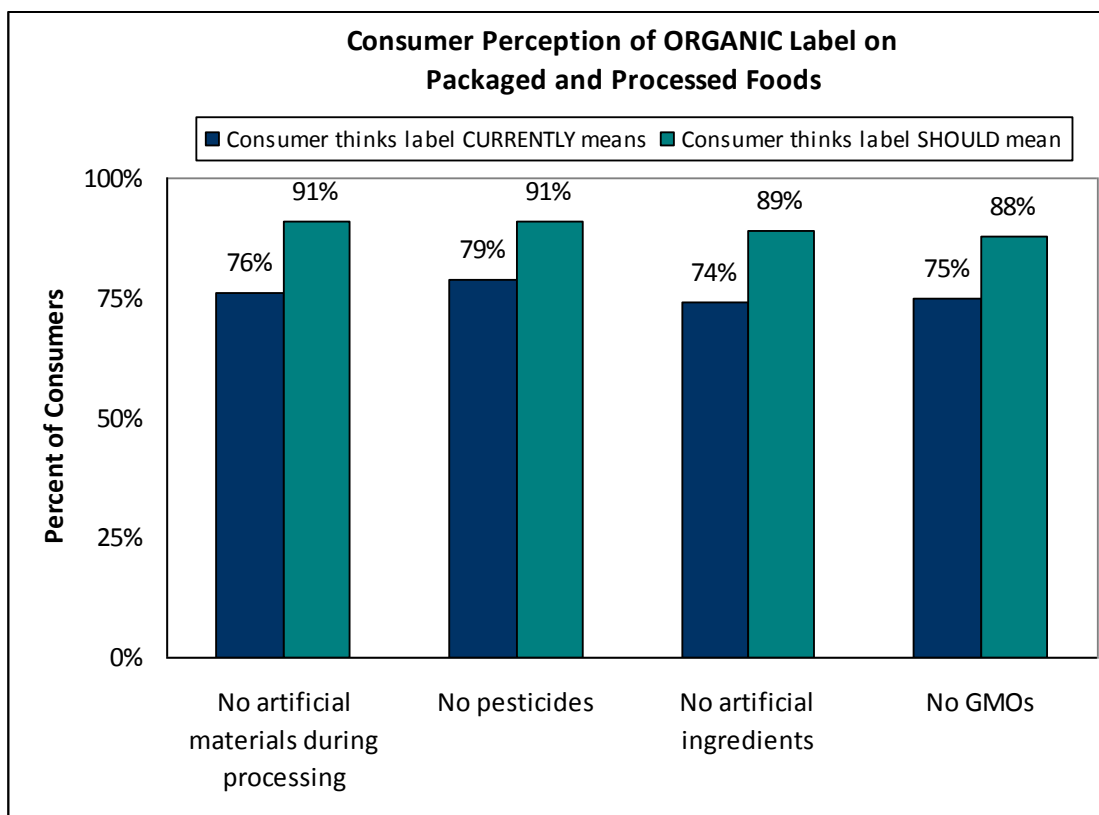
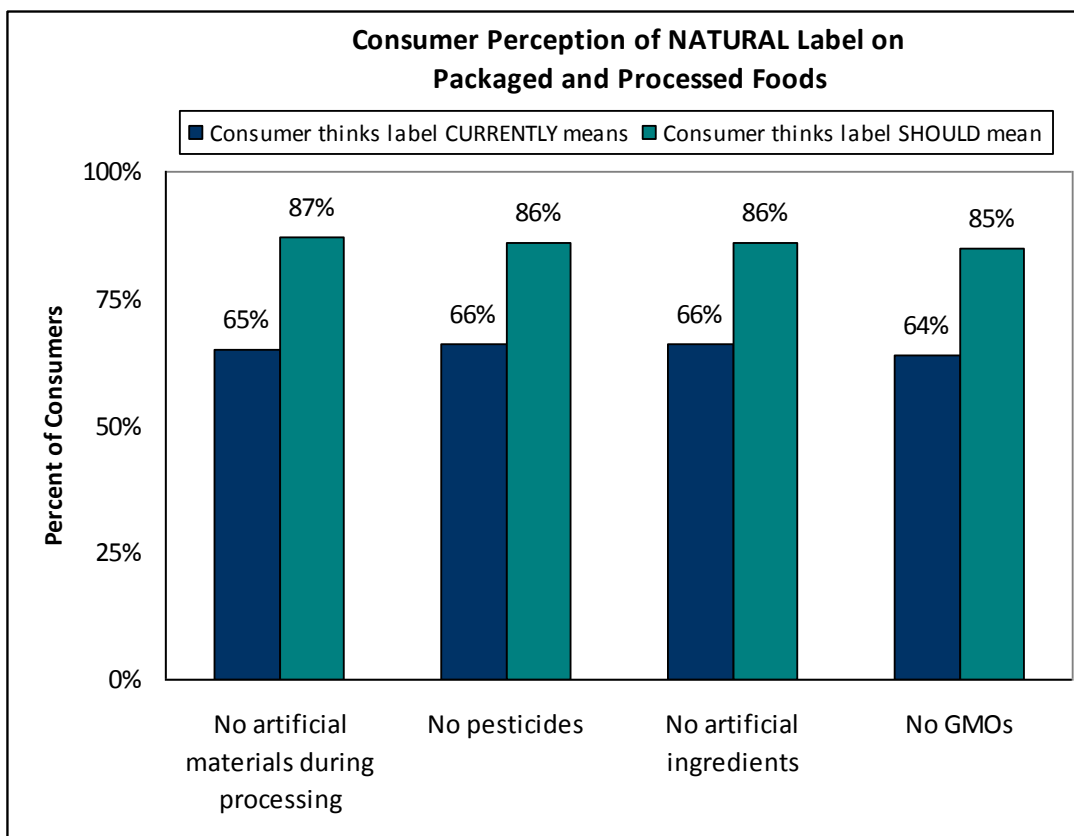
Consumers also want stronger standards for the **organic** label on meat and poultry. Many consumers think this label *currently* means no artificial growth hormones were used (81%), the animals feed contained no artificial ingredients (77%) or GMOs (75%), no artificial ingredients were added to the meat/poultry (77%), antibiotics or other drugs were only used on sick animals (68%), no antibiotics or other drugs were ever used on healthy or sick animals (60%), the animals had adequate living space (57%), and the animals went outdoors (55%). An even greater amount of consumers demand that this label *should* mean no artificial growth hormones were used (89%), no artificial ingredients were added to the meat/poultry (88%), the animals feed contained no artificial ingredients (87%) or GMOs (87%), antibiotics/drugs were only used on sick animals (81%), no antibiotics/drugs were ever used on healthy or sick animals (73%), the animals had adequate living space (73%), and the animals went outdoors (72%).



Consumers Demand More Standards for Natural and Organic Labels on Packaged and Processed Foods

While many consumers feel that the **natural** label on packaged/processed foods *currently* means no pesticides were used (66%), no artificial ingredients were used (66%), no artificial materials were used during processing (65%), and no GMOs were used (64%); an even greater percentage of consumers think the label *should* mean no pesticides were used (86%), no artificial ingredients were used (86%), no artificial materials were used during processing (87%), and no GMOs were used (85%).

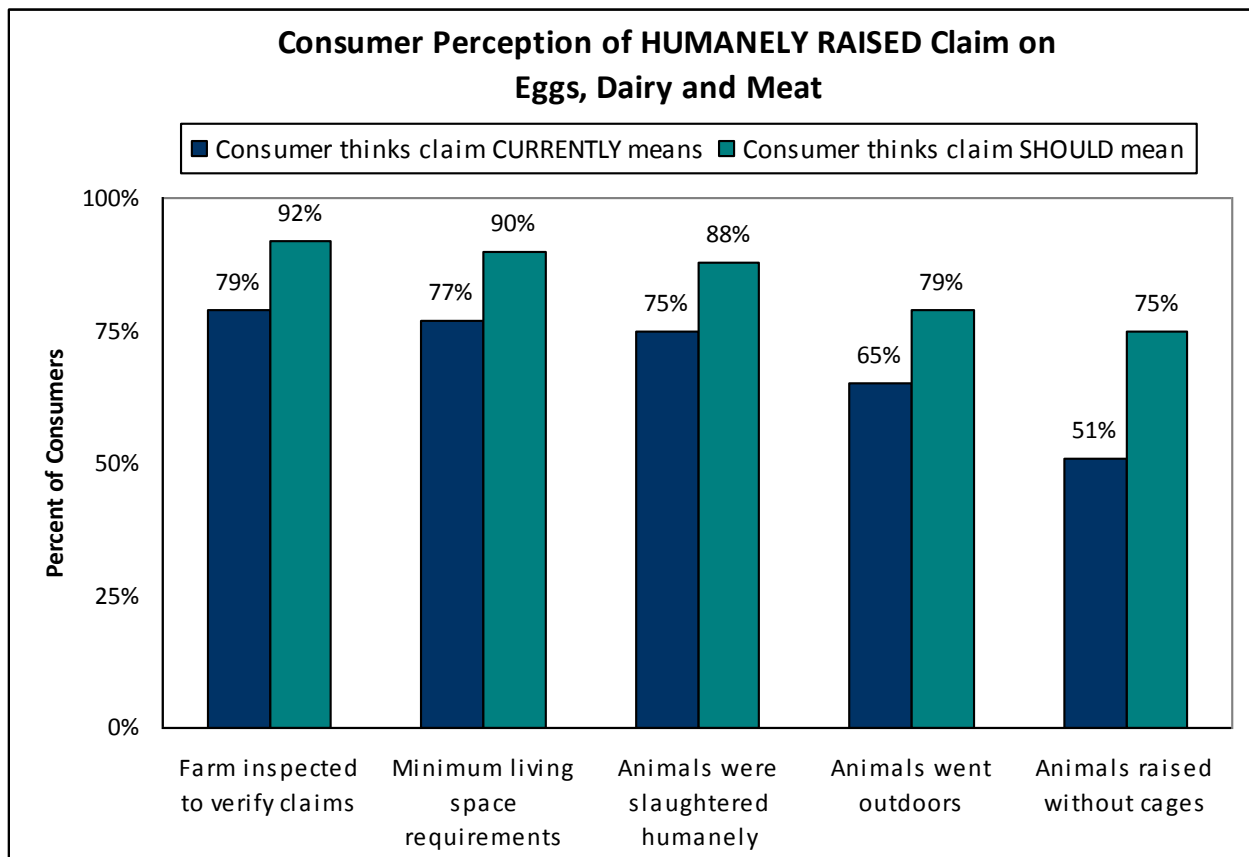
Consumers are even more stringent when it comes to what they want from the **organic** label on packaged/processed foods. While many consumers think this label *currently* means no toxic pesticides were used (79%), no artificial materials were used during processing (76%), no artificial ingredients were used (74%), and no GMOs were used (75%); an outstanding percentage of consumers demand that this label *should* mean no toxic pesticides were used (91%), no artificial materials were used during processing (91%), no artificial ingredients were used (89%), and no GMOs were used (88%).



Consumers Have High Expectations for Humanely Raised Claims on Eggs, Dairy and Meat

The majority of consumers think a **humanely raised** claim on eggs, dairy and meat *currently* means the farm was inspected to verify this claim (79%), the animals had adequate living space (77%), the animals were slaughtered humanely (75%), and the animals went outdoors (65%). Accordingly, the vast majority of consumers believe this claim *should* mean that the farm was inspected to verify this claim (92%), the animals had adequate living space (90%), the animals were slaughtered humanely (88%), and the animals went outdoors (79%).

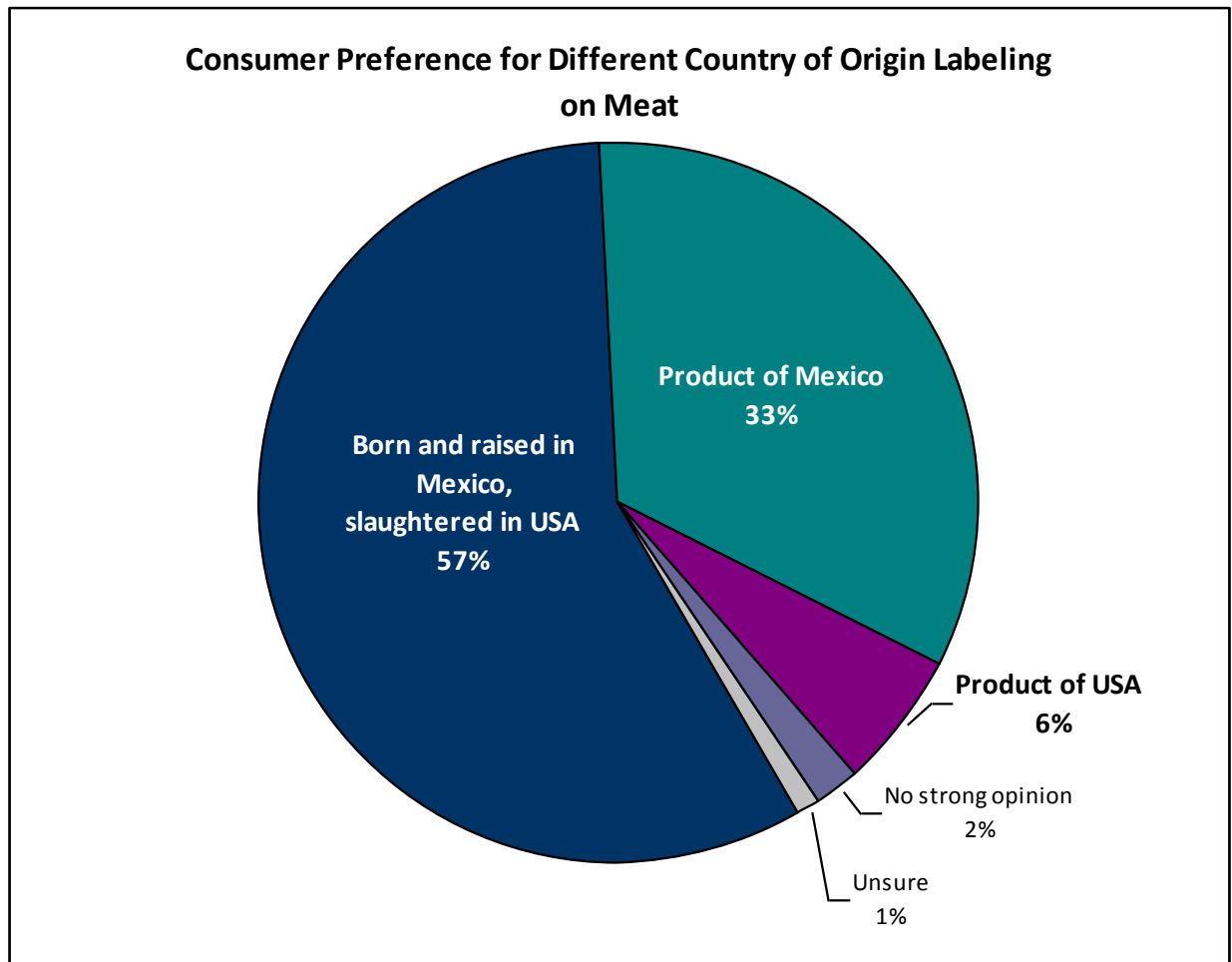
While only half of consumers think this claim *currently* means the animals were raised without cages, a clear majority of consumers (75%) think this claim *should* mean this.



Consumer Demand Information about Food Origin

The overwhelming majority of consumers want food labels to reflect country of origin (92% of consumers) and state of origin (82%).

An outstanding percentage of consumers (90%) want to know if their meat is from outside the US. Consumers were asked about their preference for country of origin labeling on meat that came from a different country like Mexico. The majority of consumers (57%) want the labeling to include where the animal was born/raised *and* where the animal was slaughtered. A sizable portion of consumers (33%) want more stringent labeling; if the animal was born or raised in a different country, these consumers feel this food is a product of that country. Few consumers (6%) adopt the more lenient view that being slaughtered in the USA is sufficient for this meat to be labeled as a USA product. Few consumers (6%) adopt the more lenient view that being slaughtered in the USA is sufficient for this meat to be labeled as a USA product. Few consumers (6%) adopt the more lenient view that being slaughtered in the USA is sufficient for this meat to be labeled as a USA product.

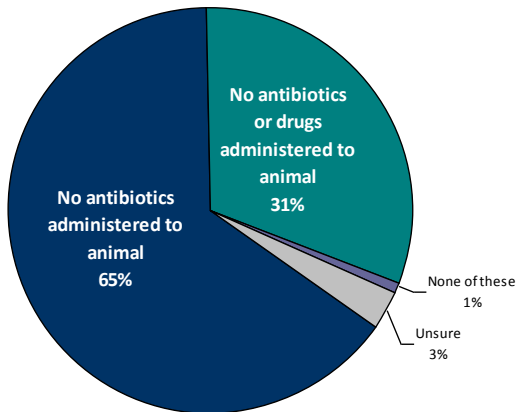


Consumers Want Strong Federal Standards for Meat Raised with Antibiotics

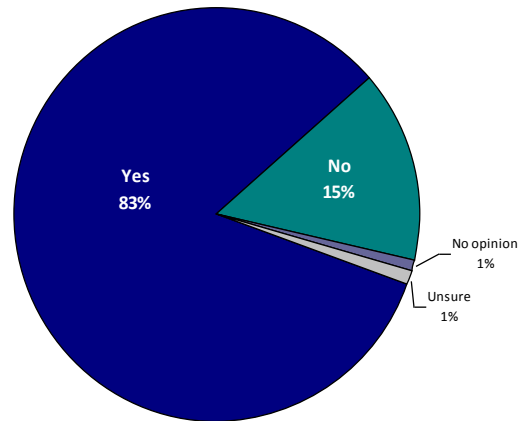
When most consumers (65%) see the **raised without antibiotics** label, they think this label means no antibiotics were used; one third of consumers mistakenly think this label means no antibiotics or *any* other drugs were used.

In addition, if an animal was routinely given antibiotics, the vast majority of consumers (83%) demand that the government require that this meat be labeled as “raised with antibiotics.”

Consumer Opinion of RAISED WITHOUT ANTIBIOTICS Label on Meat



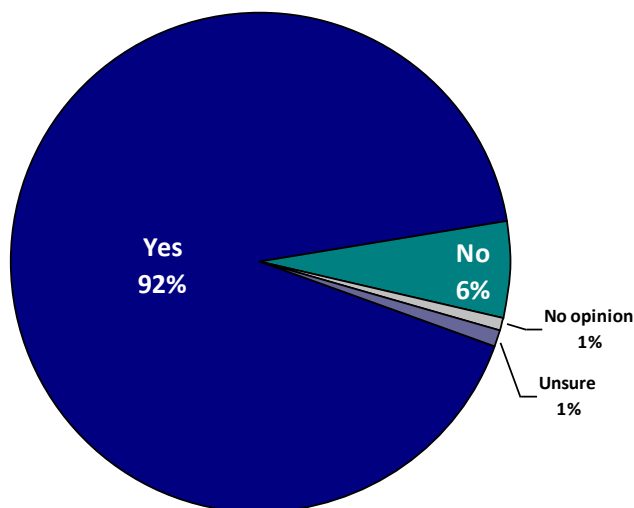
Should meat from animals fed antibiotics be labeled as such?



Consumer Mandate for Labeling and Strong Federal Safety Standards for Genetically Engineered Food

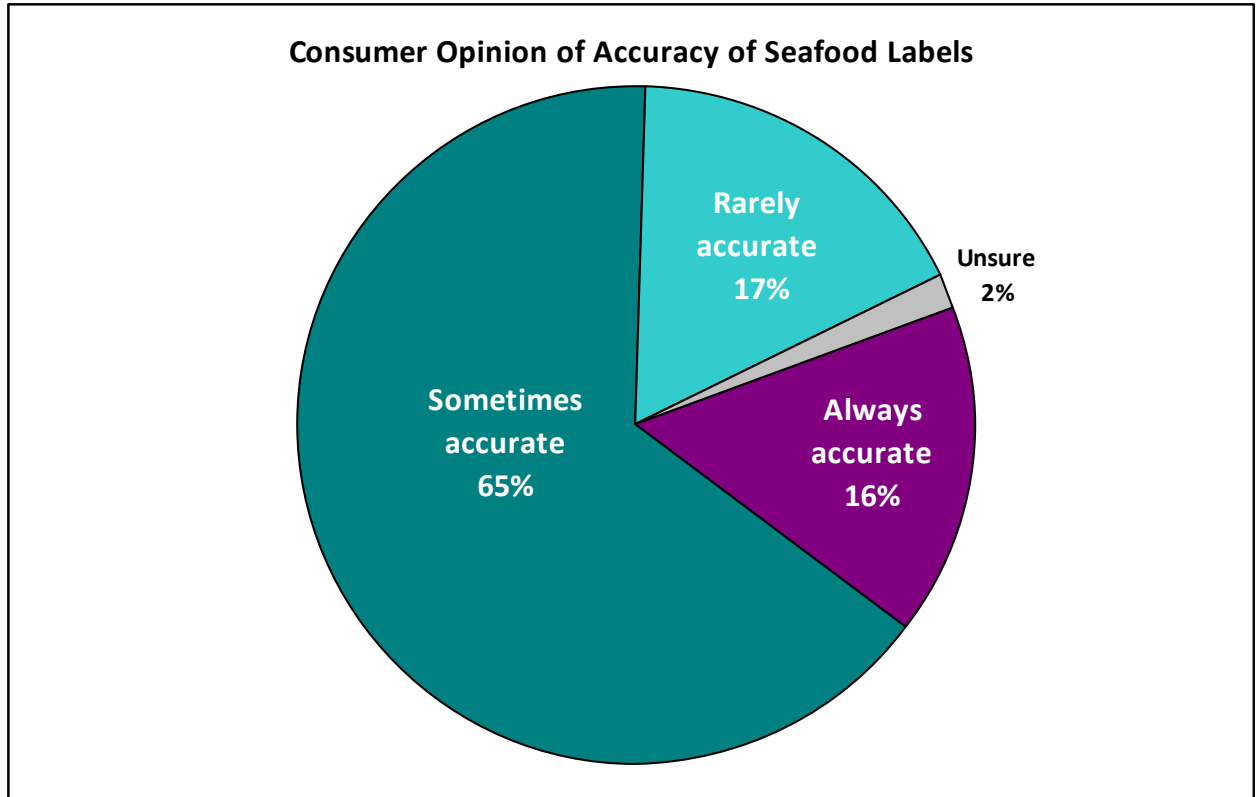
An overwhelming majority of US consumers think that before genetically engineered food can be sold it must be labeled as such (92% of consumers) and meet government safety standards (92%). Moreover, an outstanding percentage of Americans (92%) demand that the government require that genetically engineered salmon be labeled as such.

Should genetically engineered salmon be labeled as such?



Consumers Skeptical about Labels on Seafood

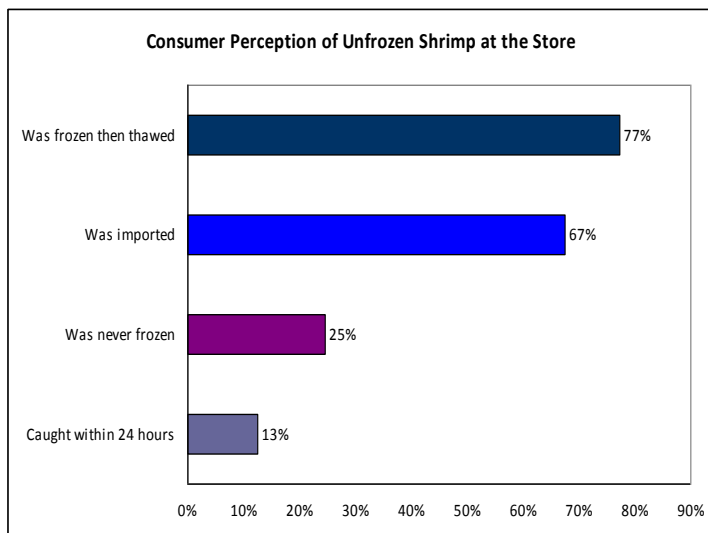
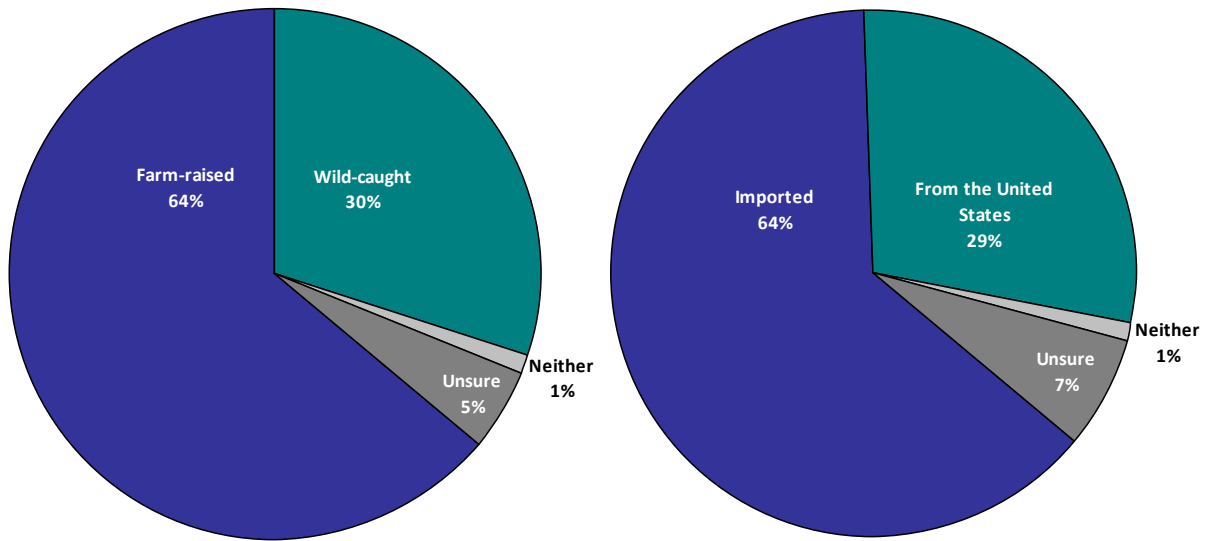
Most consumers who buy seafood (83%) have some doubt about the accuracy of labels on seafood at the fish counter. Many (65% of consumers) think these labels are only sometimes accurate; a notable portion of consumers (17%) are even more doubtful and feel these labels are *rarely* accurate.



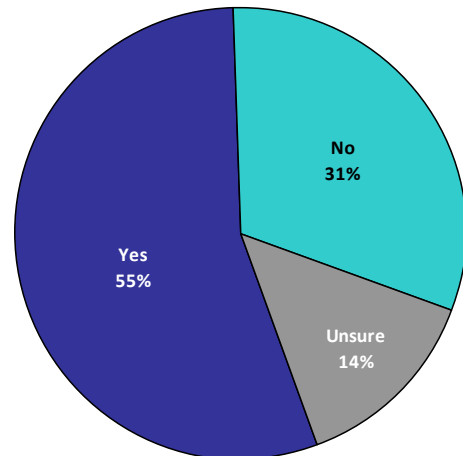
Consumers Think Most Shrimp in US Farm Raised, Imported and Not Fresh

The majority of consumers think that most of the shrimp in the US is farm-raised (64% of consumers) and imported (64% of consumers). Accordingly, when buying unfrozen shrimp at the store, the majority of consumers (67%) think this shrimp was imported. Many consumers (77%) believe this shrimp was originally frozen and then thawed. Few think the shrimp was never frozen (25%) or caught within the past day (13%). Finally, the majority of consumers (55%) think antibiotics and other drugs or pesticides are commonly used in shrimp farming.

Consumer Opinion of Shrimp Sold in the US



Are antibiotics or other drugs commonly used in shrimp farming?

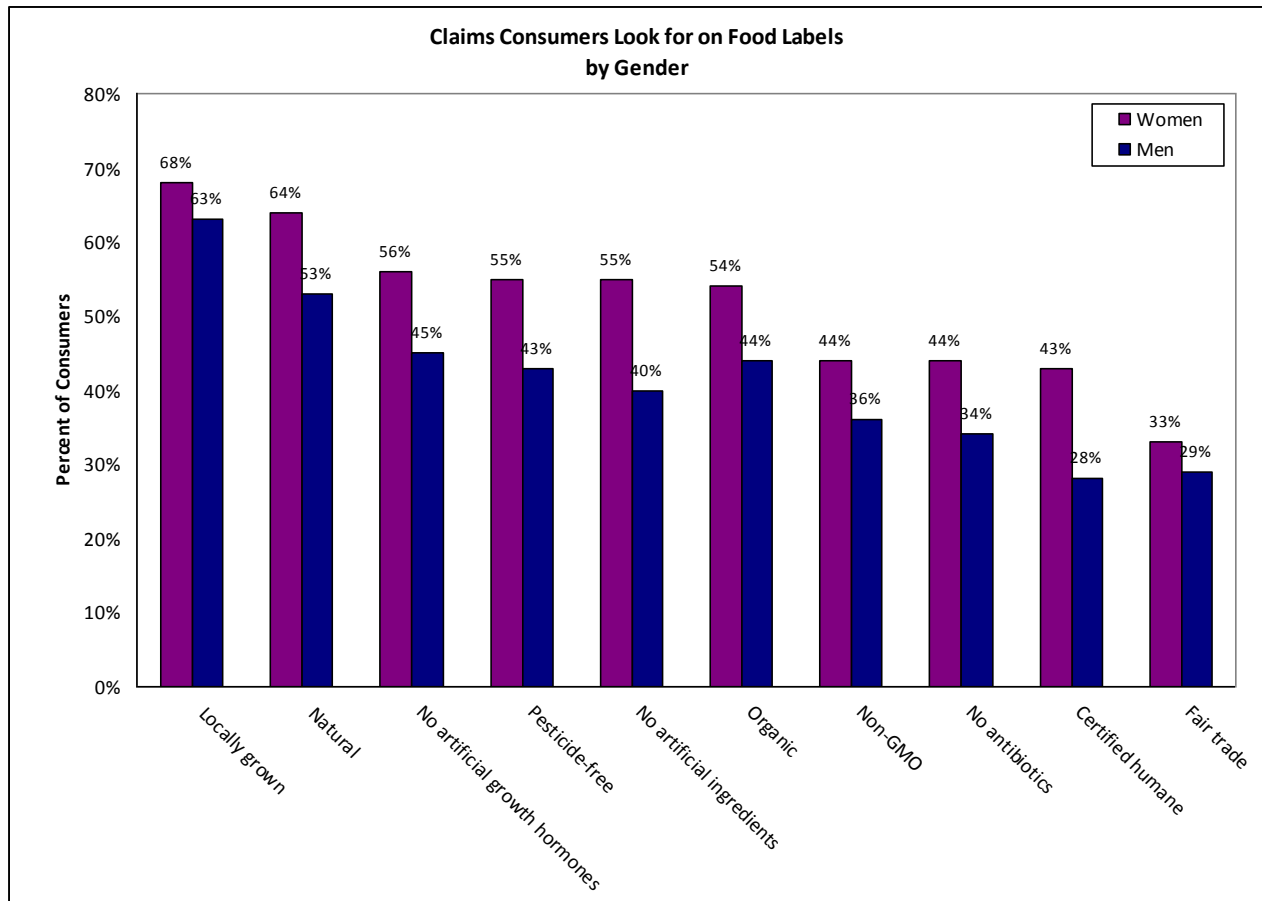


Demographic Differences

For the most part, there were no compelling differences in age, region, income and having children in the household; for some survey questions, however, there were some gender differences (tables by gender are included in attached spreadsheet). The survey findings suggest that, generally, women US consumers are more environmentally and socially conscious when it comes to the food they eat.

When shopping for food, more women (than men) are looking for the following claims: natural, no artificial growth hormones, pesticide-free, organic, non-GMO, no antibiotics, and certified humane. Accordingly, when purchasing food, more women report that the following objectives are crucial (*very important/important*): supporting local farmers, protecting the environment from chemicals, fair trade, reducing pesticide exposure, living condition of animals, reducing antibiotic use in food, and avoiding artificial ingredients. In addition, more women are willing to pay more per pound for fair trade produce.

The survey findings also showed that while men and women are similar on what they feel food labels *currently* mean, women were more stringent about what they think these labels *should* mean. More women think the **natural** label on meat and poultry *should* mean no artificial growth hormones were used, no artificial ingredients were added to the meat/poultry and that there were no artificial ingredients in the animals' feed. More women also think the **organic** label on packaged/processed foods *should* mean no pesticides, artificial ingredients, or GMOs were used. Finally, more women also believe that the **humanely raised** claim on eggs, dairy and meat *should* mean the farm was inspected to verify these claims and that the animals went outdoors.



Summary

Our survey showed that most US consumers are environmentally and socially conscious when it comes to the food they eat; popular guiding principles when purchasing food include supporting local farmers, protecting the environment, and fair conditions for farmworkers. In fact, fair trade conditions are so important to Americans, that most are willing to pay more to ensure their food was produced via fair working conditions. Our findings also showed consumers expect more from natural and organic food labels. In addition, the vast majority of consumers want food labels to reflect different country origin, and if antibiotics or genetically modified ingredients were used at any stage of food production. Among Americans there is growing awareness of misleading food labeling practices; our findings equivocally show that there is a consumer mandate for greater standardization and regulation of food labeling.

Methodology

This phone survey was fielded by ORC using a nationally-representative sample. The survey was conducted April 17-21, 2014. The margin of error is +/- 3 percentage points at a 95% confidence level. The margin of error may be higher for subgroup analysis.

Appendix: Tables

Q1: When you shop for food do you look for any of the following claims?			
	Respondents		
	Yes	No	Unsure
Locally grown or produced	66%	33%	1%
Natural	59%	40%	1%
No artificial growth hormones in meat and dairy	50%	48%	1%
Organic	49%	49%	1%
Pesticide-free	49%	48%	1%
No artificial ingredients or colors	48%	50%	1%
Non-GMO, that is, non-genetically engineered or modified	40%	57%	1%
No antibiotics	39%	59%	0%
Humanely raised, certified humane or any other animal welfare label	36%	62%	1%
Fair trade, meaning food producers were paid a living wage	31%	66%	2%
I do not shop for food			1%
Base: All Respondents			

Q2: When purchasing food, how important is each of the following as an objective for you? Would you say each is very important, important, or not important?					
	Respondents				
	<i>Crucial (Very important/ Important subset)</i>	Very important	Important	Not important	Unsure
Supporting your local farmers	92%	51%	41%	7%	0%
Protecting the environment from chemicals such as pesticides	89%	47%	42%	10%	0%
Supporting companies that provide good working conditions and fair pay to farmworkers	86%	46%	41%	13%	0%
Reducing exposure to pesticides in foods	87%	45%	41%	12%	1%
Providing better living conditions for farm animals	80%	40%	40%	19%	1%
Reducing the use of antibiotics in food production	78%	37%	41%	20%	1%
Avoiding genetically engineered or modified ingredients	72%	39%	33%	26%	1%
Avoiding artificial ingredients such as preservatives, colors or flavors	69%	31%	38%	30%	0%
I do not purchase food					1%
Base: All Respondents					

Q3: How much more would you be willing to pay PER POUND for FRUITS and VEGETABLES produced by workers who earned a living wage and were treated fairly?	
	Respondents
<i>Would pay any more (Net)</i>	79%
10 cents more per pound	22%
25 cents more	22%
<i>50 cents more or more (Subnet)</i>	34%
50 cents more	20%
One dollar more	9%
More than one dollar more per pound	5%
Would you not pay any more	18%
Don't know/Unsure	3%
<i>Base: All Respondents</i>	

Q4: Do you think that the 'NATURAL' label on MEAT and POULTRY means any of the following?			
	Respondents		
	Yes	No	Unsure
No artificial ingredients or colors were added to the meat or poultry	70%	28%	2%
No artificial growth hormones were used	68%	30%	2%
The animals' feed contained no GMOs, that is, genetically modified ingredients	64%	34%	3%
No antibiotics or other drugs were used	60%	37%	3%
The animals' feed contained no artificial ingredients or colors	60%	37%	3%
The animals went outdoors	48%	49%	4%
<i>Base: All Respondents</i>			

Q5: SHOULD the 'NATURAL' label on MEAT and POULTRY mean any of the following?	
	Respondents
<i>Any (Net)</i>	95%
No artificial growth hormones were used	89%
No artificial ingredients or colors were added to the meat or poultry	87%
The animals' feed contained no artificial ingredients or colors	85%
The animals' feed contained no GMOs, that is, genetically modified ingredients	85%
No antibiotics or other drugs were used	81%
The animals went outdoors	66%
None of these	4%
Don't know/Unsure	1%
<i>Base: All Respondents</i>	

Q6: Do you think that the 'ORGANIC' label on MEAT and POULTRY means any of the following?			
	Respondents		
	Yes	No	Unsure
No artificial growth hormones were used	81%	17%	2%
The animals' feed contained no artificial ingredients or colors	77%	21%	2%
No artificial ingredients or colors were added to the meat or poultry	77%	21%	2%
The animals' feed contained no GMOs, that is, genetically modified ingredients	75%	23%	2%
Antibiotics or other drugs were only used to treat sick animals, but were never used on healthy animals	68%	29%	2%
No antibiotics or other drugs were ever used on healthy or sick animals	60%	37%	3%
The animals' living space met some meaningful minimum size requirements	57%	41%	3%
The animals went outdoors	55%	42%	3%
<i>Base: All Respondents</i>			

Q7: SHOULD the 'ORGANIC' label on MEAT and POULTRY mean any of the following?	
	Respondents
<i>Any (Net)</i>	97%
No artificial growth hormones were used	89%
No artificial ingredients or colors were added to the meat or poultry	88%
The animals' feed contained no GMOs, that is, genetically modified ingredients	87%
The animals' feed contained no artificial ingredients or colors	87%
Antibiotics or other drugs were only used to treat sick animals, but were never used on healthy animals	81%
No antibiotics or other drugs were ever used on healthy or sick animals	73%
The animals' living space met some meaningful minimum size requirements	73%
The animals went outdoors	72%
None of these	2%
Don't know/Unsure	1%
<i>Base: All Respondents</i>	

Q8: Do you think that the 'NATURAL' label on PACKAGED and PROCESSED FOODS means any of the following?			
	Respondents		
	Yes	No	Unsure
No toxic pesticides were used	66%	32%	2%
No artificial ingredients or colors were used	66%	32%	2%
No artificial materials or chemicals were used during processing	65%	33%	2%
No GMOs, that is, genetically modified ingredients, were used	64%	34%	2%
<i>Base: All Respondents</i>			

Q9: SHOULD the 'NATURAL' label on PACKAGED and PROCESSED FOODS mean any of the following?	
	Respondents
<i>Any (Net)</i>	92%
No artificial materials or chemicals were used during processing	87%
No artificial ingredients or colors were used	86%
No toxic pesticides were used	86%
No GMOs, that is, genetically modified ingredients, were used	85%
None of these	7%
Don't know/Unsure	1%
<i>Base: All Respondents</i>	

Q10: Do you think that the 'ORGANIC' label on PACKAGED and PROCESSED FOODS means any of the following?			
	Respondents		
	Yes	No	Unsure
No toxic pesticides were used	79%	19%	2%
No artificial materials or chemicals were used during processing	76%	23%	2%
No GMOs, that is, genetically modified ingredients, were used	75%	23%	2%
No artificial ingredients or colors were used	74%	24%	2%
<i>Base: All Respondents</i>			

Q11: SHOULD the 'ORGANIC' label on PACKAGED and PROCESSED FOODS mean any of the following?	
	Respondents
<i>Any (Net)</i>	95%
No toxic pesticides were used	91%
No artificial materials or chemicals were used during processing	91%
No artificial ingredients or colors were used	89%
No GMOs, that is, genetically modified ingredients, were used	88%
None of these	4%
Don't know/Unsure	1%
<i>Base: All Respondents</i>	

Q12: Do you THINK a 'HUMANELY RAISED' claim on EGGS, DAIRY and MEAT means any of the following?			
	Respondents		
	Yes	No	Unsure
The farm was inspected to verify claims of humane treatment of animals	79%	18%	2%
The animals' living space met some meaningful minimum size requirements	77%	20%	2%
The animals were slaughtered humanely	75%	21%	3%
The animals went outdoors	65%	32%	4%
The animals were raised without cages	51%	45%	3%
<i>Base: All Respondents</i>			

Q13: SHOULD a 'HUMANELY RAISED' claim on EGGS, DAIRY and MEAT mean any of the following?	
	Respondents
<i>Any (Net)</i>	96%
The farm was inspected to verify claims of humane treatment of animals	92%
The animals' living space met some meaningful minimum size requirements	90%
The animals were slaughtered humanely	88%
The animals went outdoors	79%
The animals were raised without cages	75%
None of these	2%
Don't know/Unsure	1%
<i>Base: All Respondents</i>	

Q14: Which, if any, of the following information should be provided on labels for meat, poultry, fish and produce?	
	Respondents
Country of origin	92%
State of origin, if from the United States	82%
I do not have a strong opinion about this	1%
None of these	2%
Don't know/Unsure	1%
<i>Base: All Respondents</i>	

Q15: If MEAT came from an animal that was born and raised in a different country, such as Mexico, and then slaughtered in the United States, which of the following labels would you prefer to convey this?	
	Respondents
Born and raised in Mexico, slaughtered in the USA	57%
Product of Mexico	33%
Product of USA	6%
I do not have a strong opinion about this	2%
None of these	0%
Don't know/Unsure	1%
<i>Base: All Respondents</i>	

Q16: When you see the 'raised without antibiotics' label on meat, which ONE of the following do you think it means?	
	Respondents
No antibiotics were administered to the animal	65%
No antibiotics or ANY other drugs were administered to the animal	31%
None of these	1%
Don't know/Unsure	3%
<i>Base: All Respondents</i>	

Q17: Healthy animals can be routinely fed antibiotics to prevent disease. Should the government require that such meat be labeled as 'raised with antibiotics'?	
	Respondents
Yes	83%
No	15%
I do not have a strong opinion about this	1%
Don't know/Unsure	1%
<i>Base: All Respondents</i>	

Q18: In your opinion, which, if any, of the following conditions should be met before genetically engineered food can be sold on the market?	
	Respondents
It should be labeled accordingly	92%
It should meet mandatory government standards for long term safety	92%
I do not have a strong opinion about this	1%
None of these	1%
Don't know/Unsure	1%
<i>Base: All Respondents</i>	

Q19: Genetically engineered salmon, whose DNA has been altered to grow faster than conventional salmon, may soon be approved and sold in stores. In your opinion, should the government LEGALLY require that it be labeled as 'genetically engineered'?	
	Respondents
Yes	92%
No	6%
I do not have a strong opinion about this	1%
Don't know/Unsure	1%
<i>Base: All Respondents</i>	

Q20: When you buy seafood from the fish counter at the store, how often do you think the labels regarding species or origin are accurate?	
	Respondents
Always accurate	16%
<i>Sometimes/Rarely (Subnet)</i>	83%
Sometimes accurate	65%
Rarely accurate	17%
Don't know/Unsure	2%
<i>Base: Respondents who buy/eat seafood</i>	

Q21: Do you think that MOST shrimp sold in the United States are...	
	Respondents
Farm-raised	64%
Wild-caught	30%
None of these	1%
Don't know/Unsure	5%
<i>Base: All Respondents</i>	

Q22: Is it your understanding that MOST of the shrimp sold in the United States are...	
	Respondents
Imported	64%
From the United States	29%
None of these	1%
Don't know/Unsure	7%
Base: All Respondents	

Q23: When you last bought UNFROZEN shrimp in the store, which, if any, of the following do you think was true regarding the shrimp?			
	Respondents		
	Yes/True	No/False	Unsure
It was frozen and then thawed	77%	20%	3%
It was imported	67%	28%	4%
It had never been frozen	25%	72%	4%
It was caught within the last 24 hours	13%	85%	2%
Base: Respondents who buy/eat shrimp			

Q24: Do you think antibiotics and other drugs or pesticides are commonly used in shrimp farming?	
	Respondents
Yes	55%
No	31%
Don't know/Unsure	14%
Base: All Respondents	