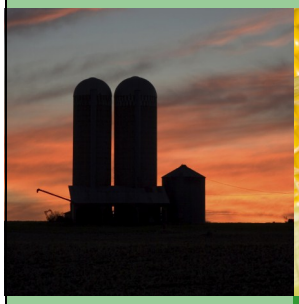
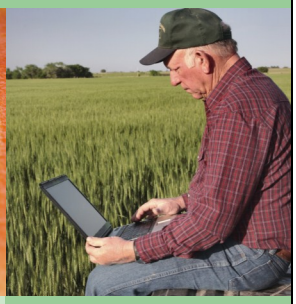
International Food Information Council

2012 "Consumer Perceptions of Food Technology" Survey

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2012 “Consumer Perceptions of Food Technology” Survey

Executive Summary

The 2012 "Consumer Perceptions of Food Technology" Survey, commissioned by the International Food Information Council, is the 15th edition of a nationally representative survey designed to gain insights into consumer perspectives on food technology and sustainability. This year's research tracks trends on public awareness and perceptions of various aspects of plant and animal biotechnology, measures confidence in the safety of the U.S. food supply, and attitudes toward food labeling. In addition, we identify benefits of food biotechnology that resonate with consumers; reveal gaps in awareness and uncover potential education opportunities related to biotechnology and new and emerging technologies, such as nanotechnology; and explore in greater depth awareness and perceptions of the importance of sustainable food production.

Key Findings

This year's survey found that, by and large, perceptions of food technology have remained steady, despite increased coverage of food technology and modern food production issues in the media in the last year. Most consumers are favorable toward various benefits offered through plant and animal biotechnology, especially those that may have a positive impact on their health and/or the health of the planet. In addition, satisfaction with information currently on food labels and the US Food & Drug Administration's (FDA's) labeling policy for foods produced through biotechnology remains high. Awareness of sustainable food production remains at its highest, and is an important aspect consumers want in food and beverage products they are purchasing or consuming.

Methodology

The 15th "Consumer Perceptions of Food Technology" Survey was fielded by independent research firm Cogent Research of Cambridge, Massachusetts between March 7 and 19, 2012. Seven hundred-fifty U.S. adults were polled using an online survey tool. Results were weighted on gender, age, race, education, income, geographic region, marital status and education to be nationally representative. Formerly the "IFIC Survey of Consumer Attitudinal Trends toward Food Biotechnology," the survey is part of a series that has been conducted since 1997.

Confidence in the Food Supply *Despite continuing attention on food safety, the majority of consumers are still confident in the safety of the U.S. food supply.*

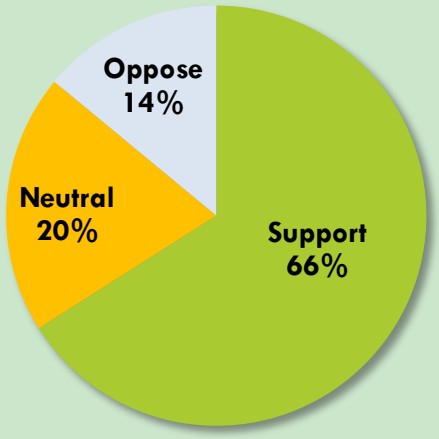
Since 2007, Americans' confidence in the safety of the U.S. food supply has remained high, with more than two-thirds of consumers indicating they are "somewhat or very confident" in the safety of the food supply, with 69% in 2007, 68% in 2008, and 69% in both 2010 and 2012. When asked about specific food safety concerns, only 2% of respondents list biotechnology as a top-of-mind concern.

Food Labeling *Satisfaction with current food labels remains high, with only one-quarter (24%) of Americans reporting that they can think of additional information they would like to see on food labels.*

Consumers are generally satisfied with information currently provided on food labels. Seventy-six percent say they cannot think of anything additional they would like to see on the label.

Of the twenty-four percent who *would* like to see additional information on the label (n=178), thirty-six percent say they would like to see more nutritional information, while nineteen percent would like to see additional ingredient information. Eighteen percent requested more information on food safety, a significant increase from two percent in 2010. Only three percent (less than one percent of the total sample) mentioned anything about biotechnology.

Figure 1: Position on FDA's Labeling Policy for Biotechnology



In addition, two-thirds (66%) of consumers say they support the Food and Drug Administration's (FDA's) current labeling policy for foods produced through biotechnology, which includes labeling changes to the nutritional content or composition of a food, or identifying a food safety issue, should biotechnology's use introduce such changes. (*See Figure 1 above).*

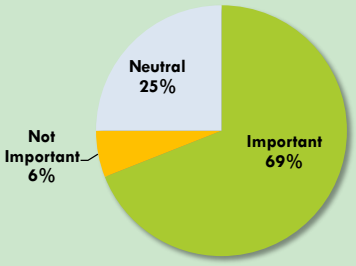
Sustainability *The majority of consumers say it is important that their food is produced in a sustainable way.*

This year, we found that more than half of consumers (55%) have heard or read at least "a little" about the concept of sustainability in food production, significantly greater than 2008, when forty-one percent of consumers had heard or read anything about sustainability in food production, and 2007, when only 30 percent had heard or read about the concept. *(See Figure 2 to the right)*

This is the first year we explored the importance of sustainability in food products Americans purchase and consume. The majority of Americans (69 percent) say that sustainability is somewhat or very important to them. *(See Figure 3 below)* However, when asked if they would be willing to pay more for food and beverage products that fit their definition of sustainability, consumers are divided, with only one-third (33%) saying they would be willing to pay more. In addition, only eighteen percent of consumers report having increased their purchasing of "sustainable" food and beverage products in the past year.

Figure 3: Importance of Sustainable Food Production

How important is it to you that the food products your purchase or consume are produced in a sustainable way?

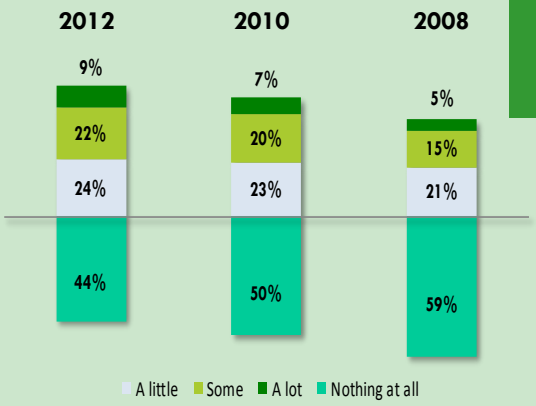


We also asked those consumers who say sustainability is important (n=516) to rank various aspects of sustainability in order of importance. More than one-third (35%) ranked "Conserving the natural habitat (water, land, rainforests, etc.) " in their top two, followed by "Ensuring a sufficient food supply for the growing global population" (32%) and "Reducing the amount of pesticides used to produce food" (30%). Other aspects of sustainability, such as "Recyclable packaging" and "Reduced packaging material" were ranked relatively lower by consumers, at eight percent and seven percent, respectively. *(See Figure 4 to the right)*

Consumers were also asked to rank the groups they believe to be primarily responsible for meeting the food demands of the world's growing population. Results indicate that consumers see meeting growing food demand as a shared responsibility, with "Farmers and ranchers" ranked first (71%) in their top three rankings, followed by "Food product manufacturers" (60%) and "Government" (54%).

Figure 2: Awareness of Sustainable Food Production

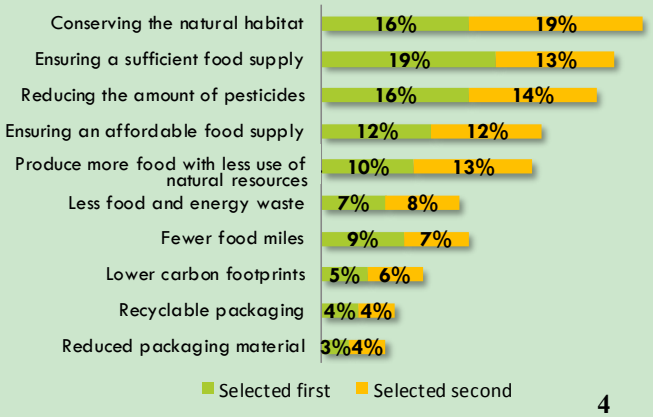
How much have you read or heard about the concept of sustainability in food production?



Also new this year, consumers were asked to rank the top five sources they trust for information on sustainability. Sixty-four percent of consumers ranked "Health organization (e.g., American Medical Association, American Heart Association, etc.)" in their top five trusted sources, followed by "Government agency (e.g., U.S. Department of Agriculture, FDA, Centers for Disease Control and Prevention, etc.)" (56%) and "Agriculture organization (e.g., Farm Bureau, Future Farmers of America, etc.)" (54%). "Health professional (e.g. doctor, nurse, pharmacist, dietitian, etc.)" and "Consumer advocacy group" came in fourth and fifth with 49% and 40%, respectively. Media sources such as TV shows, newspapers, and websites, as well as social media sources, ranked low relative to these other sources.

Figure 4: Importance of Aspects of Sustainability

Please rank the following aspects of "sustainability" in order of importance to you.



Plant Biotechnology *Americans' support of the use of food biotechnology is strongest when they consider the consumer-facing benefits such as enhanced nutrition and improved quality and taste.*

Nearly three in four consumers (74%) have read or heard at least "a little" about the concept of food biotechnology. However, only ten percent report having heard or read "a lot" about food biotechnology. This year, thirty-eight percent of consumers are somewhat or very favorable toward plant biotechnology, up from thirty-two percent in 2010, while about one in four (26%) are neither favorable nor unfavorable, and two in ten (20%) are somewhat or very unfavorable. Favorability toward using biotechnology to produce wheat and grain food products is slightly higher than general favorability toward plant biotechnology, with forty-four percent indicating that they are somewhat or very favorable. And, nearly half (49%) of consumers say they are favorable toward farmers using biotechnology to grow more crops that would help meet food demand.

Thirty percent of Americans believe foods produced through biotechnology are available in the supermarket today. When asked to name which foods those would be, consumers list a variety of foods, some correct and some incorrect, consistent with surveys in recent years. The low awareness is not surprising since most agricultural biotech traits are intended to improve crop production, and currently there are few examples of biotech foods being marketed for their direct consumer benefits. However most crops (soy, corn, canola) that are grown using biotechnology produce foods that are essentially the same as conventional foods.

Certain benefits of biotechnology resonate better with consumers than others. These tend to be consumer-facing qualities such as improved health or better taste. *(See Figure 5 below)* For example, the majority of consumers say they are somewhat or very likely to purchase foods produced through biotechnology to provide more healthful fats like Omega-3s (71%), to avoid saturated fat (68%), and to make foods taste better/fresher (69%). This is consistent from 2010 and 2008. The majority of consumers (69%) also say they would be somewhat or very likely to purchase food products made with flour from wheat that had been modified by biotechnology to provide enhanced nutritional benefits.

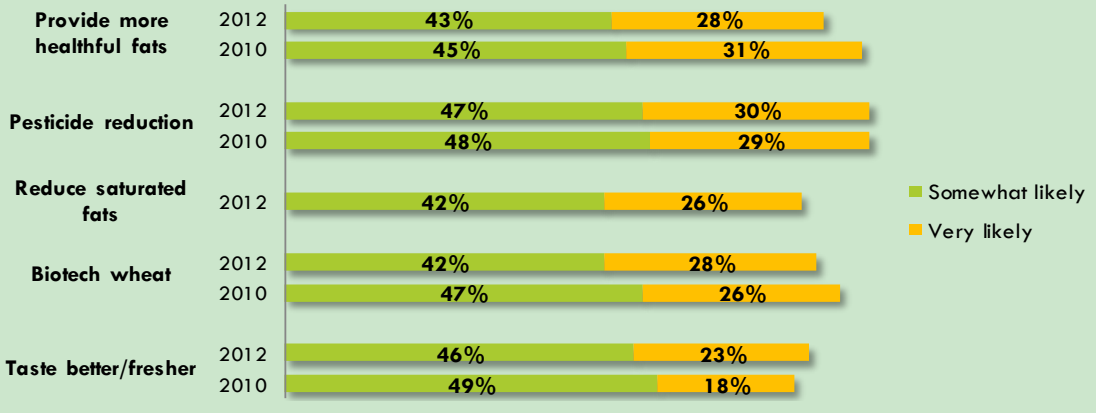
Additionally, more than three-quarters (77%) of consumers say they would be likely to purchase foods produced through biotechnology for their ability to reduce pesticide use.

Consumers ranked their top five trusted sources for information on biotechnology as: "Health organization (e.g., American Medical Association, AHA, etc.)", with fifty-seven percent; "Health professional (e.g. doctor, nurse, pharmacist, dietitian, etc.)" (56%); and "Government agency (e.g., USDA, FDA, CDC, etc.)" (50%). "Agriculture organization (e.g., Farm Bureau, Future Farmers of America, etc.)" and "Consumer advocacy group" came in fourth and fifth with 47% and 34%, respectively.

Figure 5: Likelihood to Purchase Biotech Foods for Specific Benefits

All other things being equal, how likely would you be to buy:

- *A food product made with oils that had been modified by biotechnology to provide more healthful fats, like Omega-3, in the food?*
- *A variety of produce, like corn, lettuce, tomatoes or potatoes, if it had been modified by biotechnology to be protected from insect damage and require fewer pesticide applications?*
- *A food product made with oils that had been modified by biotechnology to avoid trans fats?*
- *Bread, crackers, cookies, cereals or pasta made with flour from wheat that had been modified by biotechnology to use less land, water, and/or pesticides?*
- *A variety of produce, like corn, lettuce, tomatoes or potatoes, if it had been modified by biotechnology to taste better or fresher?*

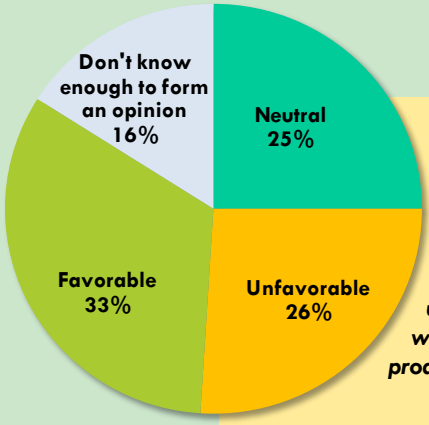


Animal Biotechnology *Consistent with 2010, lack of information about animal biotechnology is the primary reason for consumers who say they are "not favorable" toward the technology.*

About one-third (33%) of Americans are somewhat or very favorable toward animal biotechnology, while one-quarter (25%) are neither favorable nor unfavorable, and slightly more than one-quarter (26%) are somewhat or very unfavorable. The primary reasons consumers give for being "not favorable" (i.e. somewhat or very unfavorable or neutral) toward animal biotechnology relate to lack of information and not understanding the benefits of animal biotechnology: More than half (55%) of not favorable consumers (n=381) chose "I don't have enough information" about animal biotechnology as their primary reason, while forty-two percent cited "I don't understand the benefits of using biotechnology with animals." This indicates that additional education/ information about animal biotechnology could help to improve consumer understanding, enabling them to make more informed decisions regarding animal biotechnology. *(See Figure 6 to the right)*

Figure 6: Impressions of Animal Biotechnology

What is your overall impression of using animal biotechnology with animals that produce food products such as meat, milk, and eggs?

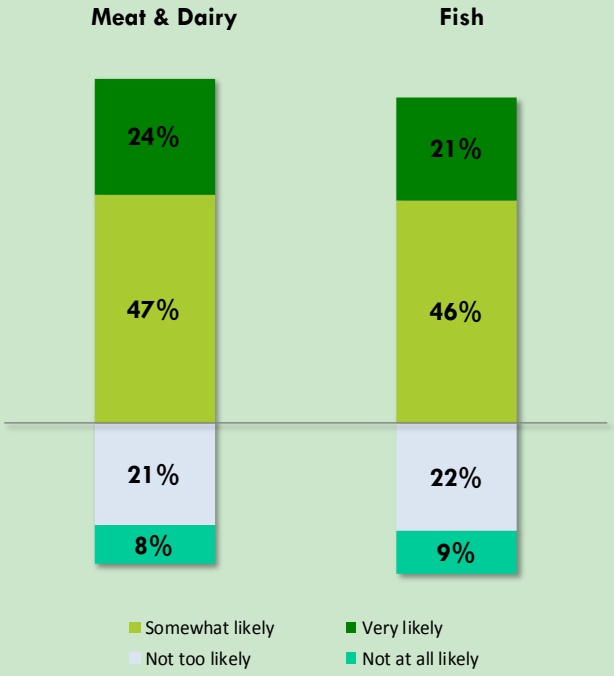


Among those who were "neutral" or "unfavorable":

Why are you not favorable toward using biotechnology with animals that produce food products?

I don't have enough information	55%
I don't understand the benefits of using biotechnology with animals	42%
I don't eat milk or dairy products	5%
Other	16%

Figure 7: Likelihood to Purchase Genetically Engineered Foods



Genomics & Genetic Engineering

Half (50%) of consumers have a "very favorable" or "somewhat favorable" impression of genomics (a way of evaluating the genetic makeup of farm animals to help make breeding decisions that will result in producing better offspring for improved meat, milk, and egg quality), while forty-four percent have a "very favorable" or "somewhat favorable" impression of genetic engineering (a form of animal biotechnology that allows for the transfer of beneficial traits from one animal to another in a precise way that allows for improved nutritional content or less environmental impact).

In addition, seven in ten (71%) consumers say they would be likely to buy meat, milk, and eggs from animals enhanced through genetic engineering, given the FDA's determination that these products are safe. Similarly, two-thirds (67%) of Americans say they would be likely to buy fish enhanced through genetic engineering, if the FDA were to determine that it was safe. *(See Figure 7 to the left)*

Perceptions of Nanotechnology *Almost half of consumers are favorable toward the use of nanotechnology in food applications that would improve food safety and quality.*

We also asked consumers about their awareness and perceptions of nanotechnology (that is, a science that involves the design and application of structures, devices and systems on an extremely small scale, called the nanoscale (i.e. billionths of a meter, or about 1-millionth the size of a pinhead). Before being given any information about nanotechnology, about six in ten consumers (61%) said they had heard or read "Nothing at all" about nanotechnology in food applications. *(See Figure 8 below)*

Figure 8: Awareness of Nanotechnology

How much have you read or heard about applying the science of nanotechnology in food applications?

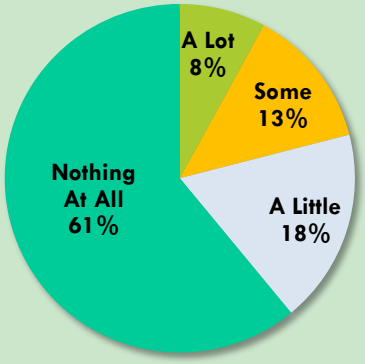
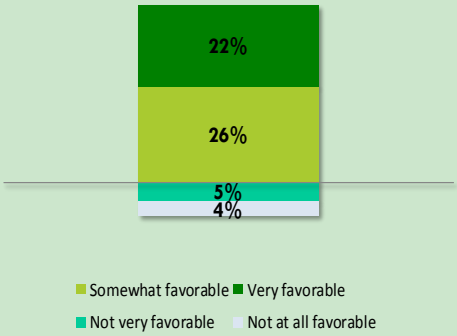


Figure 9: Perceptions of Nanotechnology

What is your overall impression of using nanotechnology in food production or packaging for such purposes as extending freshness, decreasing the risk of foodborne illness, and improving nutrition?



Neutral 23% **Don't know enough to form an opinion 20%**

However, when provided with the above definition of nanotechnology and information about potential food applications (such as in food packaging and processing to improve food safety and quality; and better nutrient and ingredient profiles to improve health), about half of consumers (48%) indicated they would be in favor of the technology. *(See Figure 9 above)* This indicates that education regarding new and emerging food technologies will continue to be important to raise consumer awareness and understanding.

For More Information:

For an electronic copy of this report and topline data, please visit the International Food Information Council Foundation Web site at: www.foodinsight.org

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