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PUBLIC VIEWS ON FOOD CLAIMS AND FOOD LABELLING

CANADIAN FOOD INSPECTION AGENCY

FINAL REPORT

March 2005



EKOS
Research Associates Inc.

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TABLE OF CONTENTS

Introduction	1
Executive Summary	3
Detailed Findings	6
Top-of-Mind Impressions	6
Expectations Regarding Food Claims	8
Understanding of Food Claims	20

INTRODUCTION

Background

The Fair Labelling Practices Program (FLPP) of the Bureau of Food Safety and Consumer Protection, Canadian Food Inspection Agency (CFIA), commissioned EKOS Research to conduct a survey of Canadians examining their views on various label claims (related to Method of Production Claims for meat and fish products).

The FLPP will be issuing a Consultation Document to stakeholders including industry and consumers associations asking for their feedback on CFIA's proposed guidelines for the labelling and advertising of food products making method of production claims. The legislation that governs labelling and advertising of foods does not provide definitions for claims including claims for "natural beef", "grain fed", "free range" and "free run". CFIA and various stakeholders do not always agree on what the general population perceives these claims to mean. The research is aimed at better understanding what messages these claims convey to the general population.

CFIA's FLPP program will use the information collected in this survey to help write the final draft of the Guidelines for Method of Production Claims. #1

Methodology

This report is based on the results of a telephone survey of 1,008 interviews with a national random sample of Canadians 18 years of age and older. Interviews were conducted between February 21 and March 1, 2005.

A sample of this size provides a statistical error margin of +/- 3.1 percentage points, 19 times out of 20. This margin of error increases when the results are sub-divided (e.g., by region, gender, etc.).

All the data were statistically weighted to ensure the sample's regional, gender and age composition reflects that of the actual population of Canada according to Census data.

EXECUTIVE SUMMARY

Top-of-Mind Impressions

Canadians were first asked, unaided, what comes to mind when they hear terms such as "natural", "grain-fed" and "fed no animal by-products" in relation to meat, poultry, or fish products. Results suggest that Canadians do not have a clear understanding of these terms. The plurality of Canadians associate these terms with healthier food (31 per cent mentioned this without prompting), almost one in five (16 per cent) could not provide a response to this question, and seven per cent were sceptical about these terms/felt they had no real meaning,

However, a relatively large proportion of Canadians (30 per cent) believe these terms means the animals were fed no animal products (13 per cent), the animals were only grain fed (9 per cent) or that the food is organic (8 per cent).

Expectations of Food Claims

Moving from the general to the specific, Canadians were asked their expectations regarding the meaning of a range of food claims (e.g., "grain fed", "natural", "raised without medication").

Grain Fed

Survey results reveal that seven in ten Canadians (69 per cent) say they would expect that a meat product carrying the claim "grain fed" means the animals were only fed grains (49 per cent to a high extent; 20 per cent to some extent). About one in four Canadians (27 per cent) would not expect this to be the case, and 4 per cent were unsure.

Expanding on this idea, Canadians were asked to what extent they would expect a meat product carrying the claim "grain fed" means the animals were only fed grains, *and* the feed did not contain other ingredients like antibiotics, vitamins, animal by-products, or vaccines. Expectations that this food claim would be true is somewhat lower than for the more general claim outlined above: just under two in three Canadians (63 per cent) indicate they expect a meat product carrying the claim "grain fed" means the animals were only fed grains and no other ingredients (38 per cent to a high extent, 25 per cent to a moderate extent). Just over one in four Canadians (29 per cent) indicate they have little expectation that this would be the case, and 8 per cent were unsure.

Examining views on "vegetable grain-fed" we find that seven in ten Canadians (72 per cent) would expect that a claim such as "vegetable grain fed, no animal by products" means the animals were only fed grains; only one in five (21 per cent) would not expect this to be the case, and 8 per cent are unsure.

Expanding on this idea, two in three Canadians (65 per cent) would expect that a claim "vegetable grain fed, no animal by products" would mean the animals were only fed grains, *and* the feed did not contain other ingredients like antibiotics, vitamins, vaccines, eggs or milk. One in four (27 per cent) would not expect this to be the case, and 7 per cent are unsure.

Two in three Canadians (68 per cent) say they would expect the claim "grain fed, no animal by-products" on a meat product to mean that the animals were raised on a feed that did not contain animal products such as milk and eggs (42 per cent to a high extent, 26 per cent to some extent). Fewer than one in four (24 per cent) would not expect this to be the case (and 8 per cent are unsure).

Similar results are exhibited when asked about expectations that a claim of "grain fed, fed no animal by-products" on a fish product would mean the fish did not consume animal products including other fish or fish products. Six in ten Canadians (61 per cent) say they would expect this to be the case (38 per cent to great extent, and 23 per cent to some extent). Three in ten Canadians (31 per cent) would not expect this to be the case, and 8 per cent are unsure.

Natural

Two in three Canadians (65 per cent) say they would expect a claim of "natural" on a food product to mean that the food contains no additives or preservatives (44 per cent to a high extent, and 21 per cent to some extent). One in three Canadians (29 per cent) would have little expectation that this would be the case, and 5 per cent were unsure.

Almost two-thirds of Canadians (64 per cent) indicate that a claim of "natural" eggs would mean that the hens were raised on feed that did not contain ingredients like vitamins, minerals, and animal by-product enzymes and amino acids, 28 per cent would not expect this to be the case, and 7 per cent were unsure how to respond.

However, most Canadians (63 per cent) also indicate that they understand a claim of "natural" on a meat, chicken or fish product could mean the animals were given antibiotics or vaccines (40 per cent to a high extent, 23 per cent to a moderate extent), while three in ten (30 per cent) would not expect a natural food product to contain antibiotics or vaccines (7 per cent are unsure).

Other Claims

Examining Canadian views on expectations regarding the food claim of "milk fed", we find that just under six in ten Canadians (58 per cent) say they would expect a veal product making the claim "milk fed" would mean the animal was not fed other ingredients such as grains, animal by-products, vitamins, minerals and antibiotics; one in three (33 per cent) would not expect this to be the case, and 8 per cent are unsure.

Survey findings also indicate that two-thirds of Canadians would expect that a claim "raised without medication" would mean the animals did not receive any types of drugs, medication or vaccines

(45 per cent to a great extent, and 21 per cent to some extent). Three in ten Canadians (28 per cent) would not expect this to be the case, and 6 per cent are unsure.

About six in ten Canadians say they would expect that a meat product making the claim that an animal was raised on feed that contained "no bone meal, no animal fat" would mean the animal was fed a diet free of all products of animal origin (38 per cent to a great extent, and 25 per cent to a moderate extent). One in three Canadians (30 per cent) would have no expectation that this would be the case, and 7 per cent were unsure.

Understanding of Food Claims

The survey also asked Canadians if they thought there would be a difference between food claims ("natural" versus "natural style"; and "free range" versus "free run" chicken).

A slight majority of Canadians (58 per cent) say they think there is a difference between natural and natural style food, 26 per cent said there is no difference between these food claims, and 15 per cent were unsure. Those who indicated there was a difference were asked to identify this difference. Results suggest that Canadians' understanding of the actual difference between these terms is exaggerated. Twenty-five per cent of these respondents could not identify any differences between natural and natural style, and 28 per cent said natural style was an imitation of natural (in other words there was no real difference). Fourteen per cent of these respondents indicated that natural means no refined products, and 10 per cent indicated that natural style could contain refined products. All other responses were mentioned by fewer than 10 per cent of these respondents.

Similar findings are exhibited in terms of perceived differences between free range and free run chicken. The plurality of Canadians (43 per cent) say there is a difference between these food claims, one in three (35 per cent) indicate there is no difference, and 22 per cent are unsure. However, when asked to identify the differences, results suggest that actual understanding is again exaggerated. Fully one in three of these respondents (31 per cent) were unable to even hazard a guess as to what is the difference between these two terms. Among those able to provide a response, most said free range is less restricted (18 per cent), free range is given a controlled diet (11 per cent), free range is never confined (9 per cent), and free range tastes better (9 per cent). All other responses were mentioned by 8 per cent or fewer of these respondents.

DETAILED FINDINGS

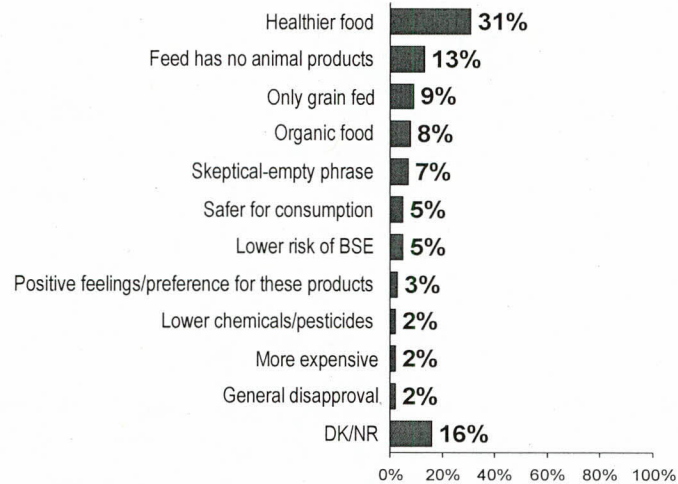
TOP-OF-MIND IMPRESSIONS

Canadians were first asked, unaided, what comes to mind when they hear terms such as "natural", "grain-fed" and "fed no animal by-products" in relation to meat, poultry, or fish products. The plurality of Canadians associate these terms with healthier food (31 per cent mentioned this without prompting).

A relatively large proportion of Canadians also believe these terms means the animals were fed no animal products (13 per cent), the animals were only grain fed (9 per cent), or that the food is organic (8 per cent). Seven per cent were sceptical about these terms/felt they had no real meaning, and five per cent associated these terms with safer food, and lower risk of BSE. All other responses were mentioned by fewer than 5 per cent of Canadian (16 per cent could not provide a response to this question).

Top-of-mind images

“What are the first things that come to mind when you hear terms such as “natural”, “grain-fed” and “fed no animal by-products” in relation to meat, poultry, or fish products?”*



*Open ended, up to three answers accepted;

{Base: All Canadians; Feb. 05}

EXPECTATIONS REGARDING FOOD CLAIMS

Moving from the general to the specific, Canadians were asked their expectations regarding the meaning of a range of food claims (e.g., "grain fed", "natural", "raised without medication").

"Grain Fed"

Survey results reveal that seven in ten Canadians (69 per cent) say they would expect that a meat product carrying the claim "grain fed" means the animals were only fed grains (49 per cent to a high extent; 20 per cent to some extent). About one in four Canadians (27 per cent) would not expect this to be the case, and 4 per cent were unsure.

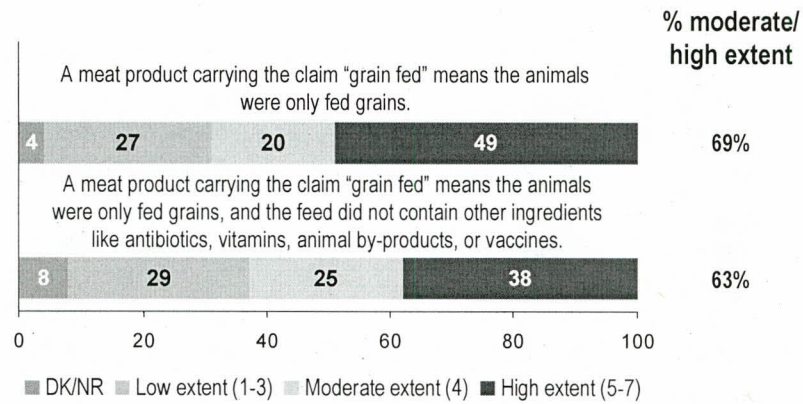
- Alberta residents (74 per cent) and women (73 per cent) are particularly likely to expect the claim grain fed would mean the animals were not only fed grain.

Expanding on this idea, Canadians were asked to what extent they would expect a meat product carrying the claim "grain fed" means the animals were only fed grains, *and* the feed did not contain other ingredients like antibiotics, vitamins, animal by-products, or vaccines. Expectations that this food claim would be true is somewhat lower than for the more general claim outlined above: just under two in three Canadian (63 per cent) indicate they expect a meat product carrying the claim "grain fed" means the animals were only fed grains, and no other ingredients (38 per cent to a high extent, 25 per cent to a moderate extent). Just over one in four Canadians (29 per cent) indicate they have little expectation that this would be the case, and 8 per cent were unsure.

- Prairie (79 per cent) and Atlantic provinces (76 per cent) residents, younger Canadians and those with less educational attainment are particularly likely to expect that the claim grain fed would mean that animals were only fed grains and no other ingredients.

Meaning of “grain fed”

“To what extent would you expect each of the following food claims to be true?”



{Base: All Canadians; Feb. 05, half sample}

“Vegetable Grain Fed”

Examining views on “vegetable grain-fed” we find that seven in ten Canadians (72 per cent) would expect that a claim “vegetable grain fed, no animal by products” means the animals were only fed grains; only one in five (21 per cent) would not expect this to be the case, and 8 per cent are unsure.

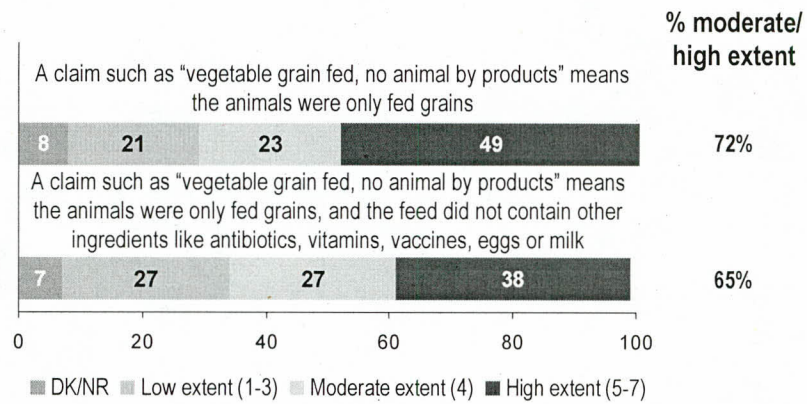
- Ontario residents (77 per cent), women (75 per cent), and higher income earners are particularly likely to feel that this claim would mean the animals were only fed grain.

Expanding on this idea, expectations of the claim “vegetable grain fed, no animal by products” meaning the animals were only fed grains, *and* the feed did not contain other ingredients like antibiotics, vitamins, vaccines, eggs or milk are somewhat muted compared to the more general idea discussed above. Two in three Canadians (65 per cent) would expect this to be true, while one in four (27 per cent) would not expect this to be the case (and 7 per cent are unsure).

- Prairie residents (77 per cent), and those under 25 years of age (79 per cent) are more likely than their counterparts to feel this food claim means the animals were only fed grains and no other ingredients.

Meaning of “vegetable grain fed – no animal by-products”

“To what extent would you expect each of the following food claims to be true?”



{Base: All Canadians; Feb. 05, half sample}

“No Animal By-Products”

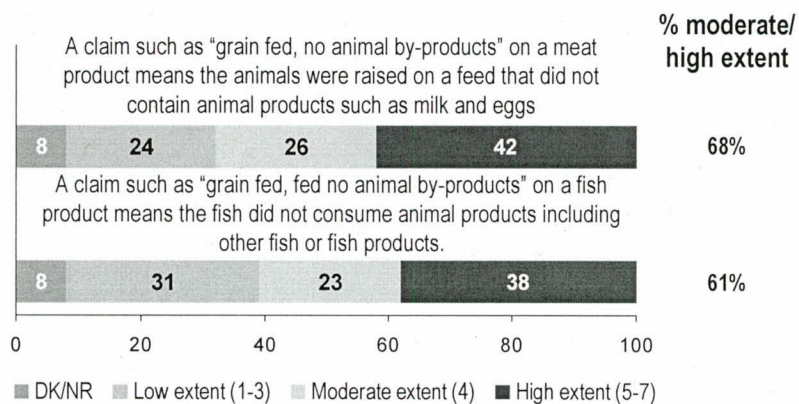
Two in three Canadians (68 per cent) say they would expect a claim “grain fed, no animal by-products” on a meat product to mean that the animals were raised on a feed that did not contain animal products such as milk and eggs (42 per cent to a high extent, 26 per cent to some extent). Fewer than one in four (24 per cent) would not expect this to be the case (and 8 per cent are unsure).

Similar results are exhibited when asked about expectations that a claim of “grain fed, fed no animal by-products” on a fish product would mean the fish did not consume animal products including other fish or fish products. About six in ten Canadians (61 per cent) say they would expect this to be the case (38 per cent per cent to great extent, and 23 per cent to some extent). Three in ten Canadians (31 per cent) would not expect this to be the case, and 8 per cent are unsure.

- Few sub-group differences are exhibited across these issues.

Meaning of “grain fed – no animal by-products”

“To what extent would you expect each of the following food claims to be true?”



{Base: All Canadians; Feb. 05}

“Natural”

Two in three Canadians (65 per cent) say they would expect a claim of “natural” on a food product to mean that the food contains no additives or preservatives (44 per cent to a high extent, and 21 per cent to some extent). One in three Canadians (29 per cent) would have little expectation that this would be the case, and 5 per cent were unsure.

- Alberta residents (73 per cent) and younger Canadians are more inclined than their counterparts to feel that a claim of “natural” would mean the food contains no additives or preservatives.

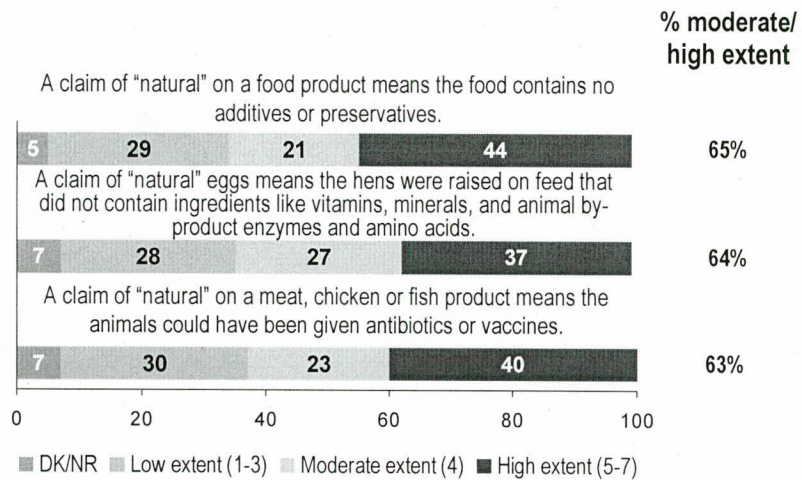
Almost two-thirds of Canadians (64 per cent) indicate that a claim of “natural” eggs would mean that the hens were raised on feed that did not contain ingredients like vitamins, minerals, and animal by-product enzymes and amino acids, 28 per cent would not expect this to be the case, and 7 per cent were unsure how to respond.

- Younger Canadians are more likely than others to feel natural eggs would mean the hens were raised on feed that do not contain the ingredients outlined above.

However, most Canadians (63 per cent) also indicate that they understand a claim of “natural” on a meat, chicken or fish product means the animals could have been given antibiotics or vaccines (40 per cent to a high extent, 23 per cent to a moderate extent), while three in ten (30 per cent) would not expect a natural food product to contain antibiotics or vaccines (7 per cent are unsure).

Meaning of “natural”

“To what extent would you expect each of the following food claims to be true?”



{Base: All Canadians; Feb. 05}

“Milk Fed”

Examining Canadian views on expectations regarding the food claim of “milk fed”, we find that just under six in ten Canadians (58 per cent) say they would expect a veal product making the claim “milk fed” would mean the animal was not fed other ingredients such as grains, animal by-products, vitamins, minerals and antibiotics; one in three would not expect this to be the case, and 8 per cent are unsure.

- Prairie residents (65 per cent), and those with less educational attainment are particularly likely to feel that a claim of “milk fed” would mean the animal was not fed the other ingredients listed above.

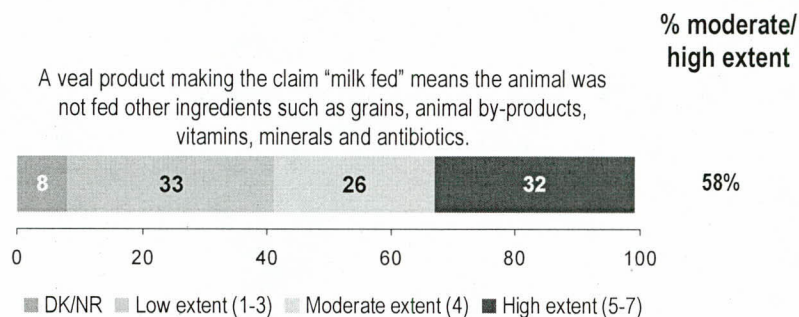
“Raised Without Medication”

Survey findings also indicate that two-thirds of Canadians (66 per cent) would expect that a claim “raised without medication” would mean the animals did not receive any types of drugs, medication or vaccines (45 per cent to a great extent, and 21 per cent to some extent). Three in ten Canadians (28 per cent) would not expect this to be the case, and 6 per cent are unsure.

- Prairie residents (70 per cent), women (70 per cent), younger Canadians, and those with higher educational attainment are particularly inclined to feel a claim of raised without medication means the animals did not receive any drugs or medications.

Meaning of “milk fed”

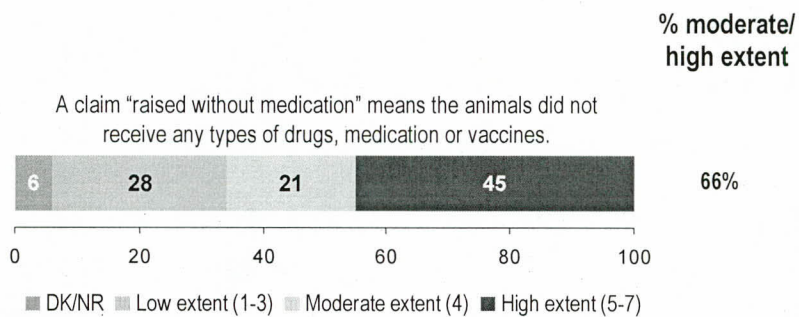
“To what extent would you expect each of the following food claims to be true?”



{Base: All Canadians; Feb. 05}

Meaning of “raised without medication”

“To what extent would you expect each of the following food claims to be true?”



{Base: All Canadians; Feb. 05}

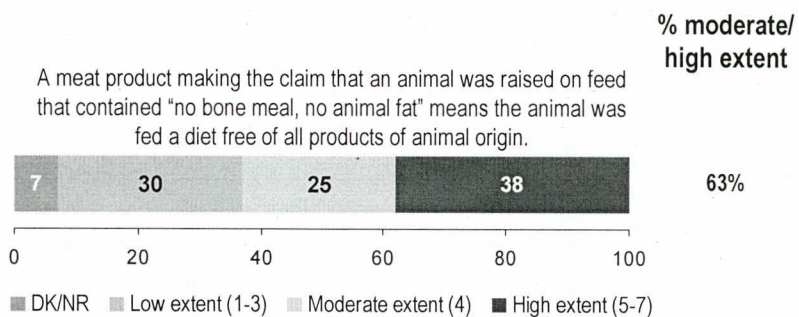
“No Bone Meal, No Animal Fat”

About six in ten Canadians say they would expect that a meat product making the claim that an animal was raised on feed that contained “no bone meal, no animal fat” would mean the animal was fed a diet free of all products of animal origin (38 per cent to a great extent, and 25 per cent to a moderate extent). One in three Canadians (30 per cent) would have no expectation that this would be the case, and 7 per cent were unsure.

- Few sub-group differences are exhibited across this issue

Meaning of “no bone meal/animal fat”

“To what extent would you expect each of the following food claims to be true?”



{Base: All Canadians; Feb. 05}

UNDERSTANDING OF FOOD CLAIMS

The survey also asked Canadians if they thought there would be a difference between food claims (such as "natural" versus "natural style"; and "free range" versus "free run" chicken).

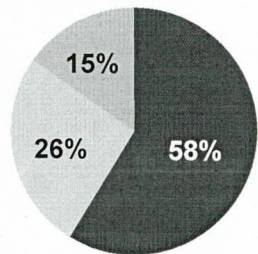
A slight majority of Canadians (58 per cent) say they think there is a difference between natural and natural style food, 26 per cent said there is no difference between these food claims, and 15 per cent were unsure.

Those who indicated there was a difference were asked to identify this difference. Results suggest that Canadians' understanding of the actual difference between these terms is exaggerated. Twenty-five per cent of these respondents could not identify any differences between natural and natural style, and 28 per cent said natural style was an imitation of natural (in other words there was no real difference). Fourteen per cent of these respondents indicated that natural means no refined products, and 10 per cent indicated that natural style could contain refined products. All other responses were mentioned by fewer than 10 per cent of these respondents

- Alberta residents (68 per cent), and those with higher educational attainment (63 per cent) are more likely than their counterparts to feel there is a difference between natural and natural style food.

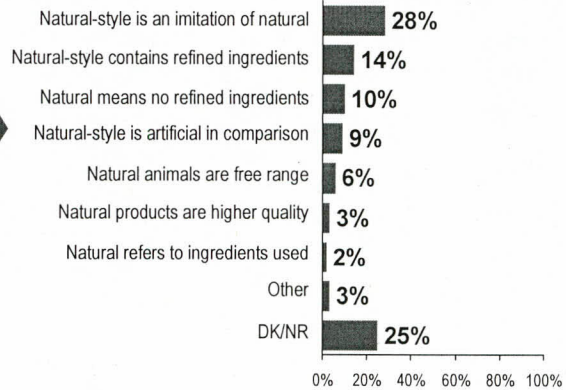
Differences between 'natural' and 'natural-style'

"Do you think there is a difference between a food claim of 'natural' versus a food claim of 'natural style'?"



■ Yes
 ■ No
 ■ DK/NR

What is the difference?"



(Base: All Canadians; Feb. 05, half sample)

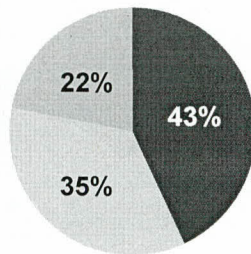
Similar findings are exhibited in terms of perceived differences between free range and free run chicken. The plurality of Canadians (43 per cent) say there is a difference between these food claims, one in three (35 per cent) indicate there is no difference, and 22 per cent are unsure.

Again those who indicated there was a difference were asked to identify this difference. Fully one in three of these respondents (31 per cent) were unable to even hazard a guess as to what is the actual difference between these two terms. Among those able to provide a response, most said free range is less restricted (18 per cent), free range is given a controlled diet (11 per cent), free range is never confined (9 per cent), and free range tastes better (9 per cent). All other responses were mentioned by 8 per cent or fewer of these respondents.

- Prairie residents (49 per cent) and rural Canadians (52 per cent) are more likely to believe there is a difference between free range and free run chicken.

Differences between 'free range' and 'free run'

"Do you think there is a difference between free range chicken and free run chicken?"



■ Yes
 ■ No
 ■ DK/NR

What is the difference?"



{Base: All Canadians; Feb. 05, half sample}