

205 00 01

D



Agriculture and
Agri-Food Canada

Agroalimentaire Canada



Importance of GE Labelling to Canadian Consumers

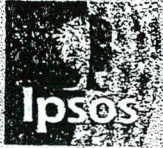
Prepared by:

Ipsos-Reid Agribusiness, Food and Animal Health

Prepared for:

Agriculture and Agri-Food Canada

October 26, 2005



Report Outline

- Summary
- Research Objectives
- Research Methodology
- Detailed Findings



Ipsos Reid



**Agriculture and
Agri-Food Canada**

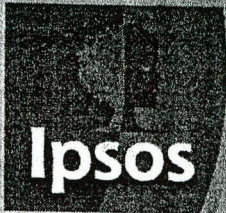
**Agriculture et
Agroalimentaire Canada**

Summary



Summary

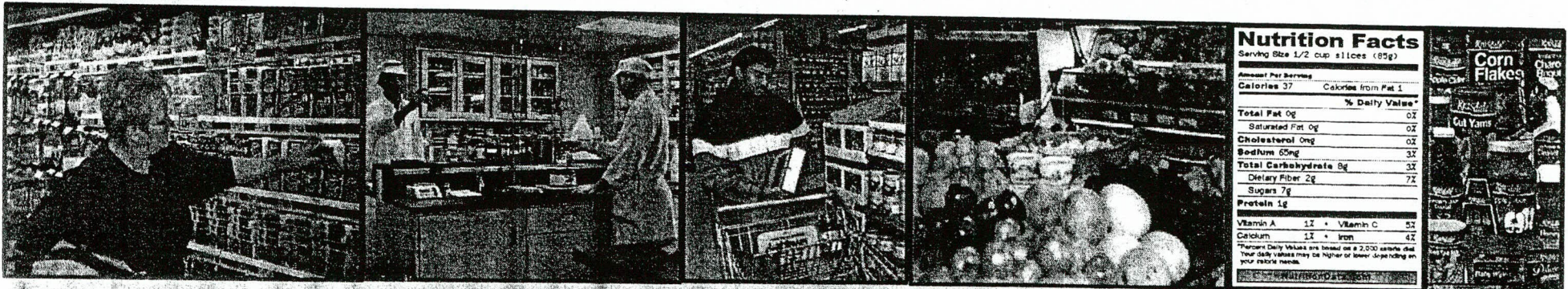
- In Sept. 2005, 1,045 Canadian consumers were interviewed by telephone to determine their perception of the relative importance of GM/GE information compared to other types of information on food labels. # 1
- Top-of-mind, the majority of grocery shoppers (59%) were unable to identify anything that needs to be added to a food label that is not already there.
 - 44% said nothing needed to be added; 15% were unsure of what needed to be added.
- Among the suggestions that were given, there was no overwhelming leader.
 - A small percentage of respondents overall suggested GM/GE ingredients (6%), nutritional value (6%), all ingredients in general (6%) and trans fat content (5%).
 - Other specific items were mentioned, but by very small percentages of respondents, and included preservatives/additives, fat content, potential allergens, complete/accurate information, sugar content, country of origin, calorie content, salt content and expiry date
- When respondents were specifically asked about items that could be on a food product, nutritional content was the most important.
 - This was followed by potential allergens, certification that the product meets specific recognized quality standards and GM/GE ingredient information.
- Label reading behaviour can be considered an indication of whether a consumer would be likely to notice a change to a food label – the more often a consumer reads labels in general, the more likely they are to see a change to the label information.
 - By their own self-classification, about four in ten grocery shoppers would be very likely to notice a label change, two in ten would be somewhat likely, and four in ten would be somewhat unlikely to notice a label change.



IpsosReid 

Agriculture and
Agri-Food Canada

Agriculture et
Agroalimentaire Canada



Importance de l'étiquetage des produits génétiquement modifiés pour les consommateurs canadiens

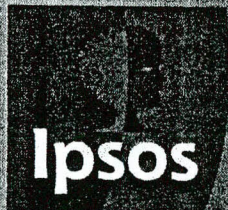
Préparé par :

Ipsos-Reid, division Agroalimentaire, aliments et santé animale

À l'intention de :

Agriculture et Agroalimentaire Canada

Le 26 octobre 2005



Ipsos  **Reid**

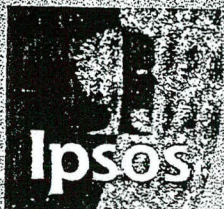


**Agriculture and
Agri-Food Canada**

**Agriculture et
Agroalimentaire Canada**

Résumé

- En septembre 2005, 1 045 consommateurs canadiens ont été interrogés par téléphone pour déterminer leur perception de l'importance relative de la présence de renseignements sur les produits génétiquement modifiés (GM) et issus du génie génétique (IGG), comparativement aux autres renseignements que l'on peut retrouver sur les étiquettes de produits alimentaires.
- La majorité des consommateurs qui font l'épicerie (59 %) n'ont pas été en mesure de déterminer des renseignements qui devraient être ajoutés en priorité aux étiquettes de produits alimentaires.
 - 44 % des répondants ont affirmé que rien ne doit être ajouté; 15 % des répondants ne savaient pas exactement quels renseignements devraient être ajoutés.
- Parmi les suggestions données par les répondants, aucune ne s'est clairement démarquée des autres.
 - Un faible pourcentage de répondants ont suggéré les ingrédients GM/IGG (6 %), la valeur nutritive (6 %), tous les ingrédients en général (6 %) et la teneur en gras trans (5 %).
 - D'autres éléments précis ont été mentionnés, mais par un très faible pourcentage des répondants, et comprenaient les agents de conservation et les additifs alimentaires, la teneur en matières grasses, les allergènes potentiels, des renseignements complets et précis, la teneur en sucre, le pays d'origine, la valeur calorique, la teneur en sel et la date d'expiration.
- Lorsqu'on a demandé aux répondants précisément quels renseignements pourraient être indiqués sur les étiquettes de produits alimentaires, la valeur nutritive constituait, selon eux, le renseignement le plus important.
 - Ont suivi : les allergènes potentiels, la certification que le produit satisfait à des normes de qualité précises et reconnues et les renseignements sur les ingrédients GM/IGG.
- Ses habitudes de lecture des étiquettes peuvent permettre de déterminer si un consommateur serait susceptible de remarquer un changement apporté à l'étiquette d'un aliment – plus souvent le consommateur lit les étiquettes en général, plus il est susceptible de remarquer les changements qui pourraient y être apportés.
 - Selon les réponses obtenues, environ quatre consommateurs sur dix qui font l'épicerie seraient très susceptibles de remarquer un changement d'étiquette, deux sur dix seraient plutôt susceptibles de le remarquer, et quatre sur dix seraient plutôt susceptibles de ne pas le remarquer.



Ipsos Reid



**Agriculture and
Agri-Food Canada**

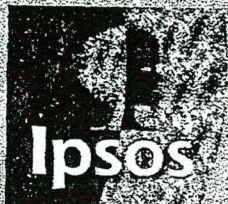
**Agriculture et
Agroalimentaire Canada**

Research Objectives



Research Objectives

- The purpose of this research was to obtain an improved understanding of how consumers perceive the need for GM/GE information on food labels in comparison to other information that could be added to a label.
- The research was intended to address the following objectives:
 - Examine on an unaided basis, consumers' desire for having specific information, including the presence of GM/GE ingredients, on a food label;
 - Measure the importance of including GM/GE information relative to the inclusion of other information on a food label;
 - Identify different segments of "label users" and examine responses among each segment; and,
 - Provide overall results and cross-tabulations by region and specific demographics (e.g., age, income, education).



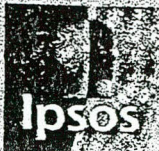
Ipsos Reid



**Agriculture and
Agri-Food Canada**

**Agriculture et
Agroalimentaire Canada**

Research Methodology



Research Methodology

- Telephone interviews were used to collect feedback from main or joint grocery shoppers for the home between September 19 and September 25, 2005.
 - The Canadian Ipsos-Reid Express (CIRE) Omnibus was used as a data collection vehicle
 - Questions were included on two waves of the CIRE, contacting a total of 2,009 Canadian adults aged 18 or older
 - From this overall sample, 1,045 adults who were either *primarily* or *jointly* responsible for grocery shopping for the home, distributed roughly equally between each of the two waves, were selected to participate in the full study
 - Effective margins of error are +/-3.0% for a sample of this size (n=1045)

- The following analytic techniques were used:
 - *Trade-off Analysis* to determine **stated** importance of specific items on a food label
 - In this analysis, a number of paired items are presented to the respondent who then identifies which item of the pair is more important to their decision
 - Each respondent sees all possible items, but in different pairings
 - A standard block design is implemented to ensure each specific item is paired with all other items an equal number of times across the full sample
 - *Thurstone Case V analysis* to determine **relative** importance of specific items on a food label
 - This analysis uses the results of the Trade-off analysis and presents those results on a standardized scale, allowing the determination of which specific items are more important in the decision and by how much.



Questions Asked

Questionnaire

1. Are you the primary or joint shopper for food purchased for your home?

Yes – Primary

Yes – Joint/Shared

No

[CONTINUE IF “Yes” – ELSE, SKIP TO NEXT SECTION]

2ab

2. Thinking about labels on the food you buy for your home, what if anything, do you feel should be on a label that is not currently on food labels now? Anything else? [RECORD FIRST AND OTHER MENTIONS]

2a

2b

3a-7f

3. Now, I will read you a list of information items that could be on a food label. Between each pair of information items I mention, please tell me which is the most important to you to have on a food label. [READ ITEMS IN PAIRS – READ FIRST PAIR] Between (INSERT ITEM) or (INSERT ITEM), which one is more important to you?

3a (Information about whether the product is genetically modified or not

Information about a specific health benefit of the product

3b (The country of origin of the product

An indication that the product is organic

3c (The nutritional content of the product (for example: calories, trans fat, or sodium)

An indication that the product is suitable for a vegetarian diet

3d (An indication that the product is Kosher or Halal

An indication that the animals were treated humanely (for example: in a dairy or meat product)

3e (A statement to indicate that the product was obtained through fair trading practices (for example: in a product from a third-world country)

An indication that the product was produced in an environmentally friendly way

3f (A certification that the product meets a recognized quality standard (for example: a VQA wine)

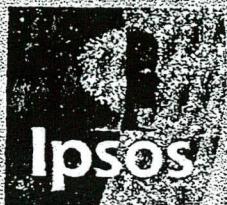
Information that the product contains a potential allergen



Questions Asked

4. I would now like to read you several statements about how different people use labels while shopping for food. Please tell me which of these statements best describes how you use food product labels on a typical shopping trip. [READ LIST]
Which one best describes yourself? [RECORD ONE RESPONSE]

- A I always read the nutritional information and/or ingredient list on every product I buy
- B I read labels on most of the food products I buy, looking for specific items in the ingredient list or nutritional facts
- C I sometimes read labels, looking for specific items in the ingredient list or nutritional facts,
- D I only read nutritional and ingredient information on labels when buying a new product or a brand I've never purchased before
- E I rarely read anything on a food product label beyond things like brand name, price and expiry date
- F I never read the nutritional or ingredient information labels on the food products I buy



Ipsos Reid



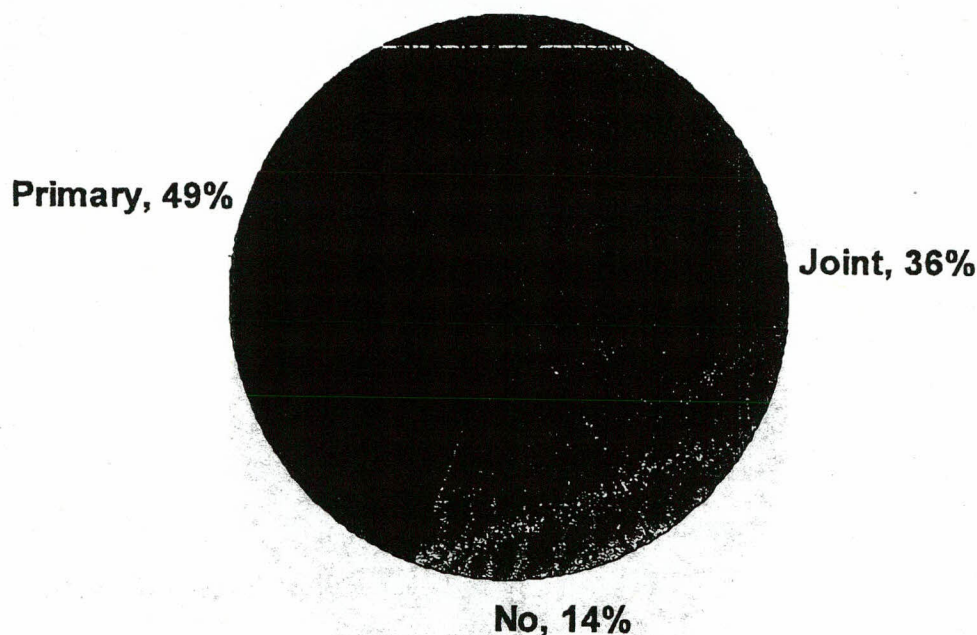
**Agriculture and
Agri-Food Canada**

**Agriculture et
Agroalimentaire Canada**

Detailed Findings

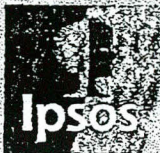
Grocery Shoppers in the Home

Q. Are you the primary or joint shopper for food purchased for your home?



Base: All respondents: n=2009

- Of the adult population surveyed, half (49%) were the primary grocery shopper for the home and another third (36%) were at least jointly responsible.
 - All respondents in both waves of the CIRE were asked this question and the remainder of the study was completed with a selection of those primarily or jointly responsible for grocery shopping for the home, approximately 500 from each wave.

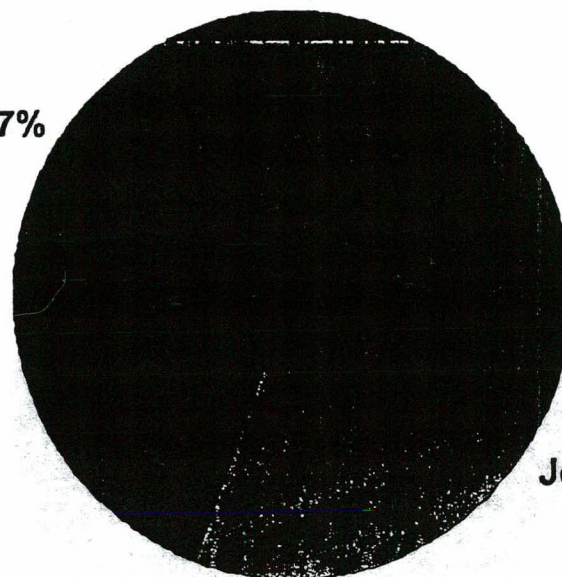


Grocery Shoppers in the Home

(continued)

Q. Are you the primary or joint shopper for food purchased for your home?

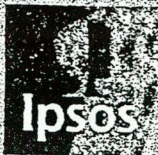
Primary, 57%



Joint, 43%

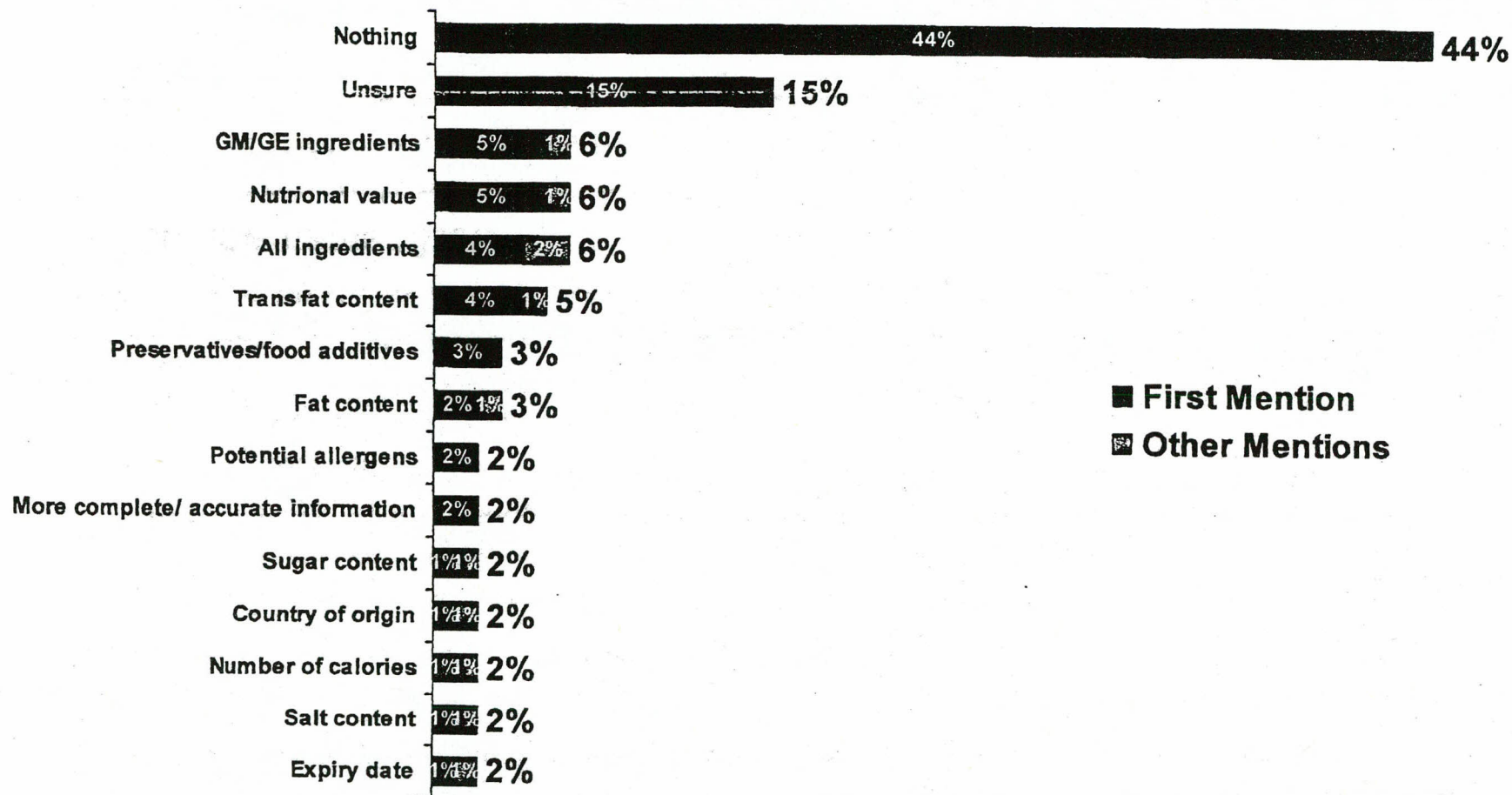
Base: Grocery Shoppers: n=1045

- Of the sample responding to the full set of questions, 57% were the primary grocery shopper for the home and 43% were at least jointly responsible for grocery shopping.



Top-of-Mind Desires to Have Items Added to Food Labels

Q. Thinking about the labels on the food you buy for your home, what, if anything, do you feel should be on the label that is not currently on food labels now? [Total Mentions]



Base: Grocery Shoppers: n=1045



Top-of-Mind Desires to Have Items Added to Food Labels

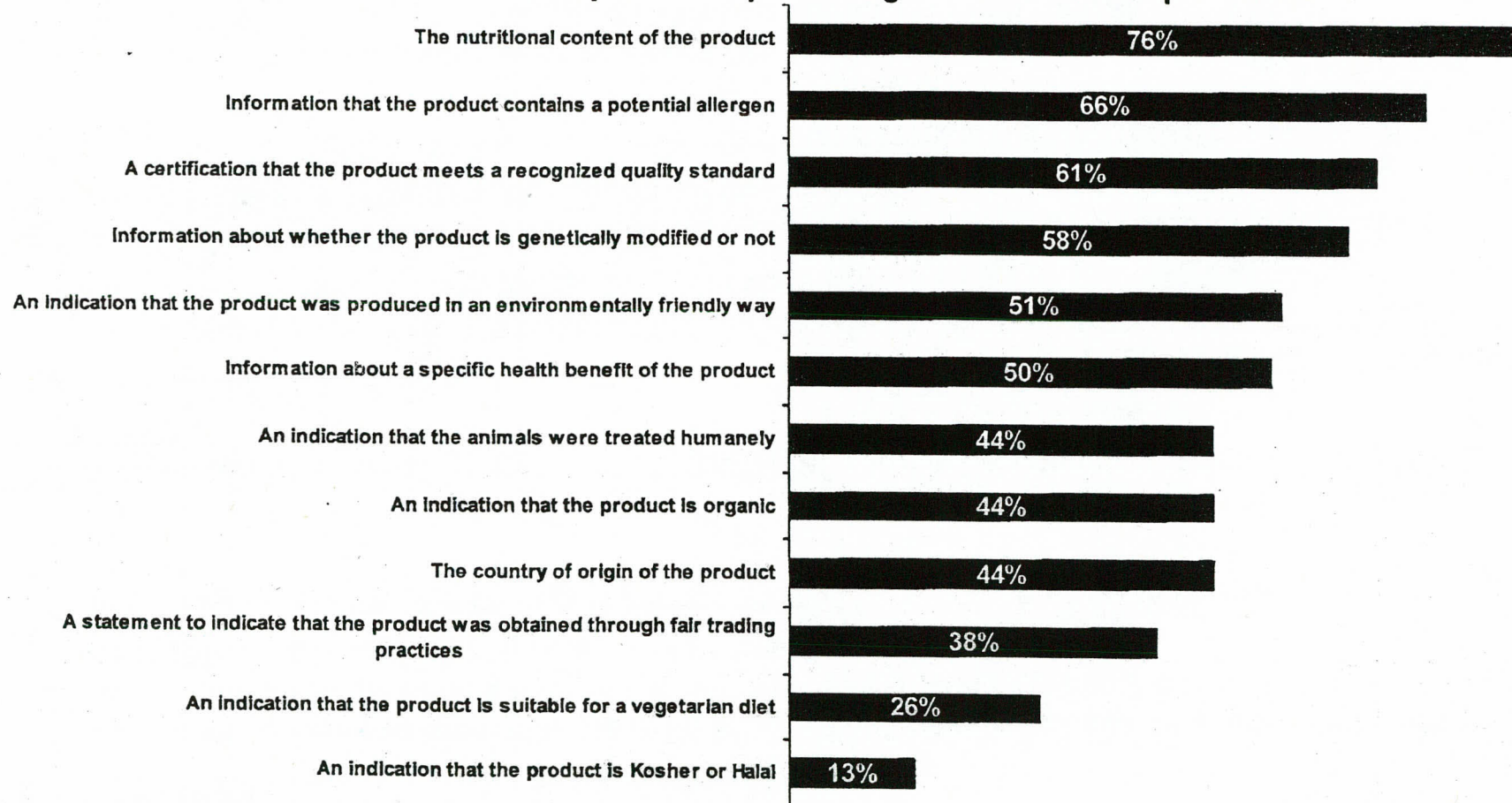
- A majority of respondents felt there was no need for any additional information on a food label over what is there currently (44% Nothing; 15% Unsure)
- GM/GE ingredients (6%) were the most often mentioned additional item desired, along with nutritional value (6%), all ingredients (6%) and trans fat content (5%).
 - There are a number of other items mentioned, including: food additives/ preservatives and general fat content (each at 3%); allergy warnings, more complete/accurate information, sugar content, country of origin, number of calories, salt content and expiry date (all at 2%); larger print, easier to understand labels, price and information for diabetics (all at 1%).
- The desire to see GM/GE ingredients identified on a food label was higher among grocery shoppers likely to notice new items on food labels (8% among those very likely or somewhat likely) than among those somewhat unlikely to notice new items (3%).
- Respondents with higher levels of education were more likely to mention wanting GM/GE ingredients identified on a food label (10% among university grads; 7% among those with some post secondary education; 2% among those with high school or less)
- Respondents in Quebec and BC were more likely to mention wanting GM/GE ingredients identified (10% and 9%, respectively) than in other provinces (4% in ON and Atlantic Provinces; 3% in AB; 1% in SK/MB)



Stated Importance of Specific Items on a Food Product Label

Q. Now, I will read you a list of information items that could be on a food label. Between each pair of information items I mention, please tell me which is the most important to you to have on a food label.

Number of times item was picked as percentage of times it was presented



Base: Grocery Shoppers: n=1045

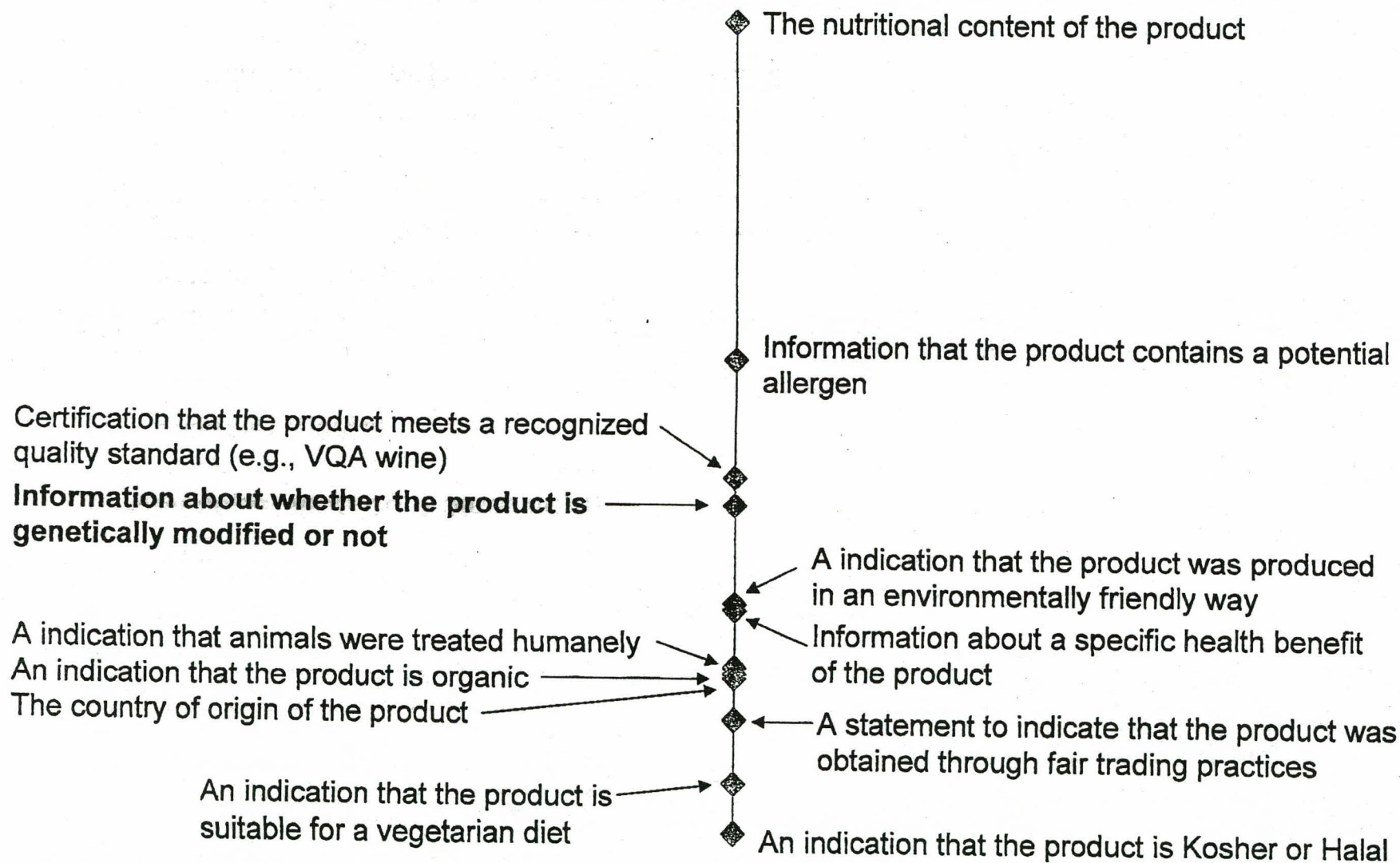


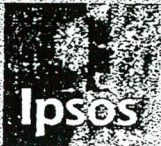
Stated Importance of Specific Items on a Food Product Label

- The nutritional content of a product is the most important information to have on a food label (chosen 76% of the time it was presented as an option), followed by information about a potential allergen (66%) and certification that the product meets a certain quality standard (61%)
- Information about whether the product is genetically modified/engineered (58%) follows in fourth position
- An indication that the product was produced in an environmentally friendly fashion (51%) and information about a specific health benefit (50%) fall slightly behind information about GM/GE ingredients
- Indications that animals were treated humanely, indications that the product is organic, and the country of origin are all rated fairly equally (44% each), followed by statements indicating the product was obtained through fair trading practices (38%)
- Indications that the product is suitable for a vegetarian diet (26%) and whether the product is Kosher or Halal (13%) were at the bottom of the list
- While grocery shoppers in all provinces chose nutritional information as the most important item to have on a food label, where they placed GM/GE indications varies somewhat
 - BC and Quebec placed information about GM/GE ingredients the highest, taking second spot in BC and third in Quebec; Ontario and the Atlantic Provinces placed it in fourth spot; Alberta and Saskatchewan/Manitoba placed it the furthest down the list, in sixth spot in both regions
- Based on their reported label-reading habits, respondents very likely to notice new information on food labels tended to place more importance on having GM/GE ingredients identified than those who would be only somewhat likely or unlikely to notice new information on food labels.

Relative Importance of Specific Items on a Food Product Label

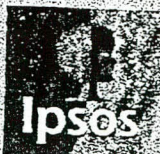
Relative importance of having each item presented on a food product label





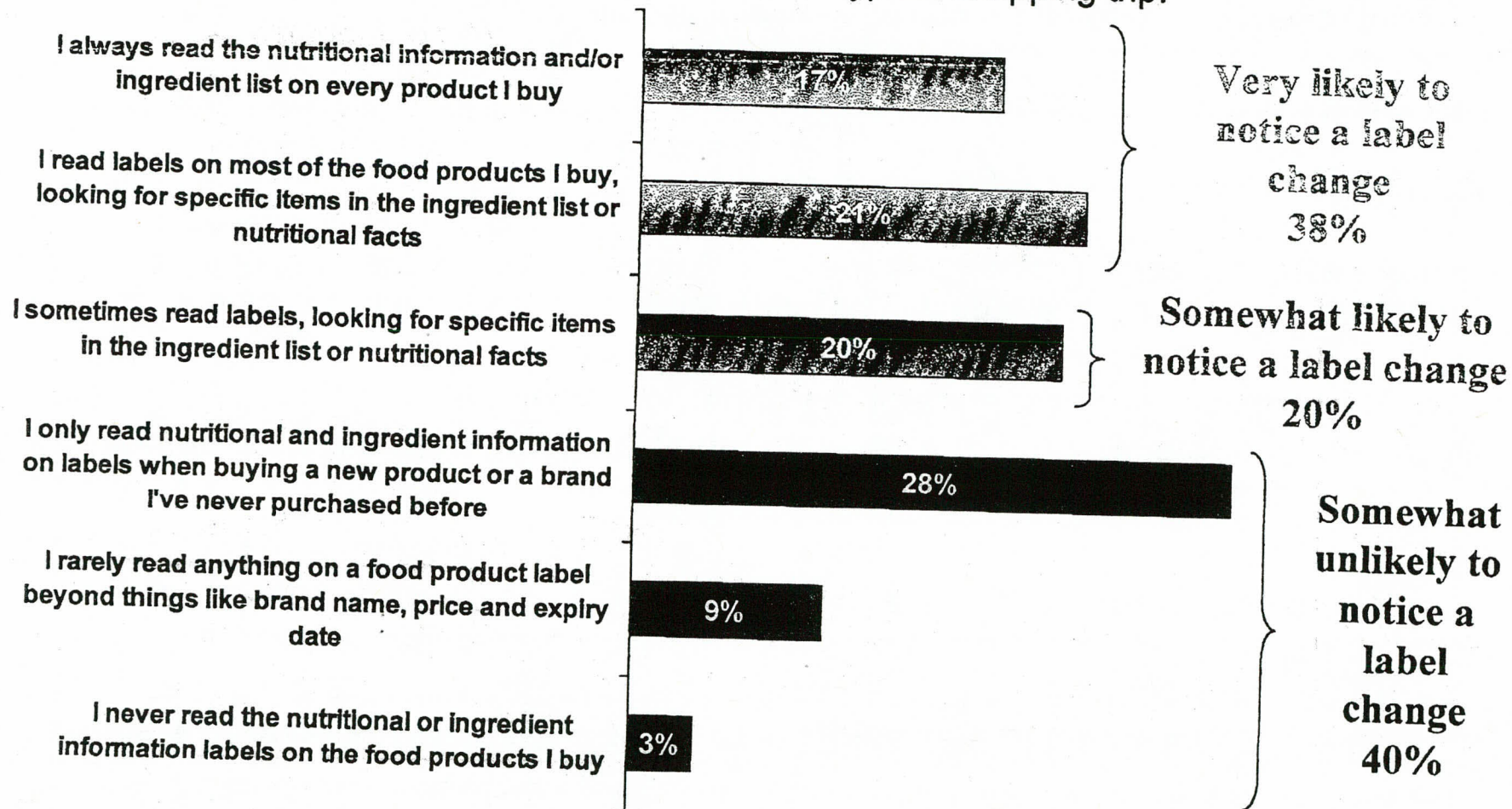
Relative Importance of Specific Items on a Food Product Label

- Simply knowing the stated importance of having specific items on a food label is revealing, but does not give us an indication of how much more important any particular item is over others. To gain insight into the relative importance of a particular item, Thurstone Case V analysis was used to produce an isotherm (on the previous page) which presents items on a standardized scale showing the relative importance of all items tested.
- Nutritional content information led all other items by a significant margin, as seen by its overall separation from other items.
 - It was nearly twice as important to grocery shoppers as the next item, information about a potential allergen.
 - It was more than twice as important as certification that the product meets a certain quality standard and information about whether or not the product is genetically modified.
 - It was nearly twenty-five times as important as the least important item, indications the product is Kosher or Halal.
- Information about potential allergens was second most important and nearly one and a half times as important as information about the product containing GM/GE ingredients.
- Certification that the product meets a recognized quality standard and information about whether a product is genetically modified or not were relatively equally important and fell in roughly third spot in order of importance overall.
 - Both of these items were nearly one and a half times as important as the next cluster of items, indications that the product was produced in an environmentally friendly fashion and information about a specific health benefit of the product.
- Other items tested tend to cluster together and had much less separation between them than items at the top of the isotherm.



Label Reading Behaviour/ Likelihood to Notice a Label Change

Q. I would now like to read you several statements about how different people use labels while shopping for food. Please tell me which of these statements best describes how you use food product labels on a typical shopping trip.

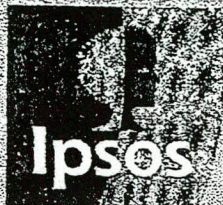


Base: Grocery Shoppers: n=1045



Label Reading Behaviour/ Likelihood to Notice a Label Change

- Grocery shoppers were asked about their typical use of labels when buying food, revealing different categories of label users. These categories can be used as a general indicator of the impact a change to a food product label could have on consumer purchase behaviour and whether consumers would notice the change to a food product label.
- Based on their reported label-reading habits, 38% of grocery shoppers would be very likely to notice new information added to food labels, 20% would be somewhat likely to notice, and 40% would be somewhat unlikely to notice.
 - Shoppers in Ontario (44% very likely) would be the most likely to notice information added to food labels, while those in Saskatchewan/Manitoba (27% very likely) would be the least likely notice.
 - 40% in BC, 31% in Alberta, 37% in Quebec and 30% in the Atlantic Provinces would be very likely to notice information added to food labels.
 - Grocery shoppers in Alberta were the most likely to fall into the "somewhat unlikely to notice" category (52%).
 - Women (43% very likely) would be more likely to notice information added to food labels than men (32% very likely).
 - Shoppers with a university education (44% very likely) would be more likely to notice information added to food labels than those with some postsecondary education (36% very likely), those with high school (34% very likely), and those with less than high school (32% very likely).

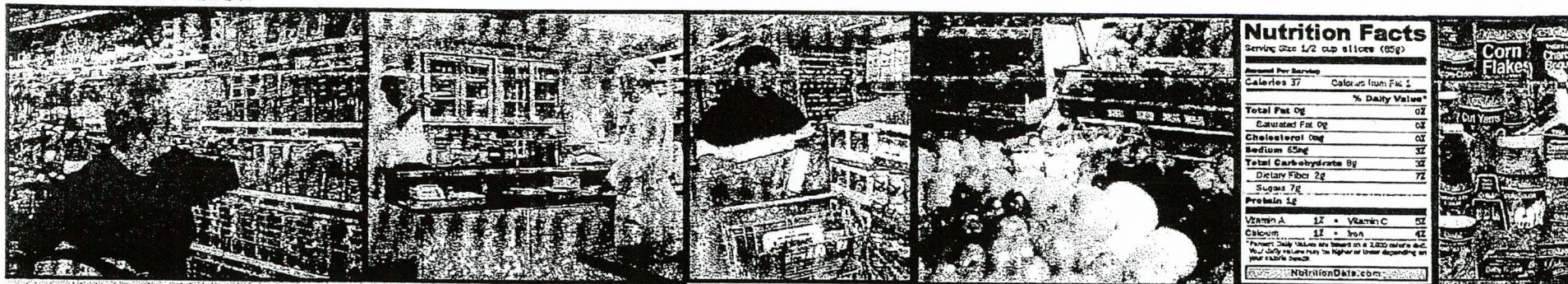


Ipsos Reid



Agriculture and
Agri-Food Canada

Agriculture et
Agroalimentaire Canada



End