

CONSUMER REPORTS® NATIONAL RESEARCH CENTER
Survey Research Report

Organic Food Labels Survey
2014 Nationally-Representative Phone Survey
1,016 adult U.S. residents
March, 2014

Introduction

Organic products have risen in popularity in the past decade; however, there are still some questionable practices in the regulation of this industry. In addition, while most consumers purchase organic food, there is some concern about what consumers know about these products, and what they want regarding regulation of this industry.

In March, 2014, the Consumer Reports® National Research Center conducted a nationally representative phone survey to assess consumer opinion regarding the labeling of organic 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 1,016 adult U.S. 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 U.S. population. This report summarizes the findings from this survey.

Highlights

Subject of Organic Food Labeling Relevant to Most of US Population

- Our findings show that the subject of organic food labeling is relevant to most of the US population. The majority of US consumers (84%) buy organic food; as much as 45% of Americans buy organic food once a month or more.

Consumers Think Changes Needed for Labeling on Organic Products

- Most consumers believe that the organic label on produce *currently* means that no toxic pesticides were used (81%) or no antibiotics were used (66%); the vast majority of consumers feel that the organic label on produce *should* mean that no toxic pesticides (91%) or antibiotics were used (86%).
- Most consumers think changes are needed to organic labeling on chicken and eggs; for example, while only half of consumers believe that this label *currently* means that the chickens' living space met minimum size requirements, the majority (68%) feel this label *should* indicate this.

Consumers Want to Know if Their Organic Produce is from a Different Country

- If organic produce is from a different country, the overwhelming majority of consumers (84%) want origin labeling to reflect this.

Consumers Demand Strong Federal Standards for Organic Products

- Nearly all consumers (92%) want at least one federal standard for organic fish. The vast majority of consumers think federal standards should require that: (1) 100 percent organic feed is used, (2) no antibiotics or other drugs are used, and (3) no colors are added.
- Consumers want constraints on the approval of artificial ingredient use in organic products; the majority of consumers (71%) want approval for as few artificial ingredients as possible.
- An overwhelming percentage of consumers (84%) think the use of artificial ingredients in organic products should be *discontinued*, if not reviewed, after 5 years; few consumers (15%) endorse continued use of the artificial ingredient *without* review.

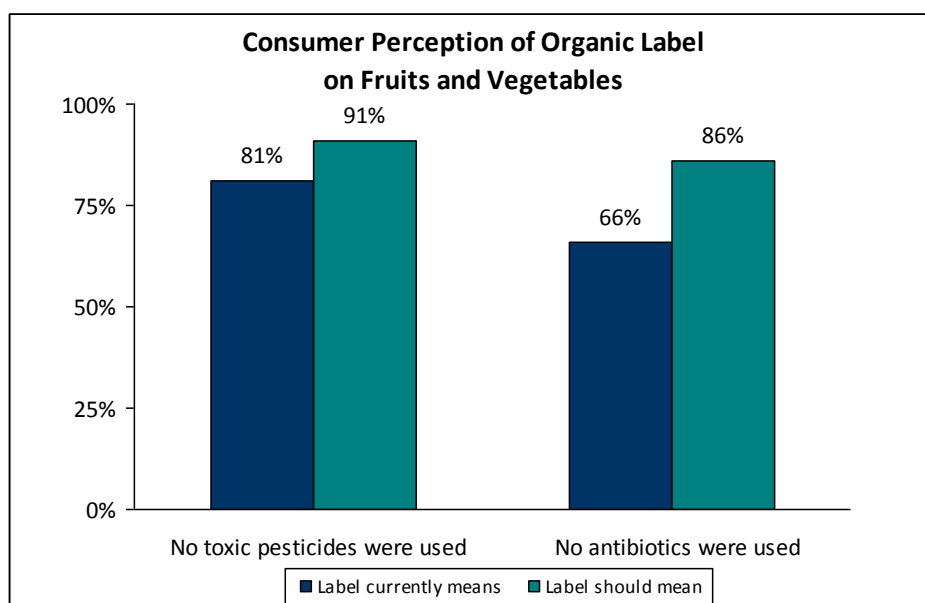
Organic Food Labeling Relevant to Most Consumers

The majority of consumers (84%) buy organic food; nearly 45% of Americans buy organic food once a month or more. This suggests that the subject of organic food labeling is relevant to most US consumers. In addition, the findings suggest that there are no compelling demographic differences (e.g., age, number of children, region) in frequency of organic food purchasing; this again confirms that the issue of organic food labels is relevant to most of the US public.

How often do you TYPICALLY buy food labeled 'organic'?	
	Respondents
Buy organic food (Net)	84%
Every week	18%
2-3 times a month	18%
Once a month	9%
Rarely (less than once a month)	39%
Do not buy organic food	15%
Don't know/Unsure	1%

Consumers Want More from Organic Label on Produce

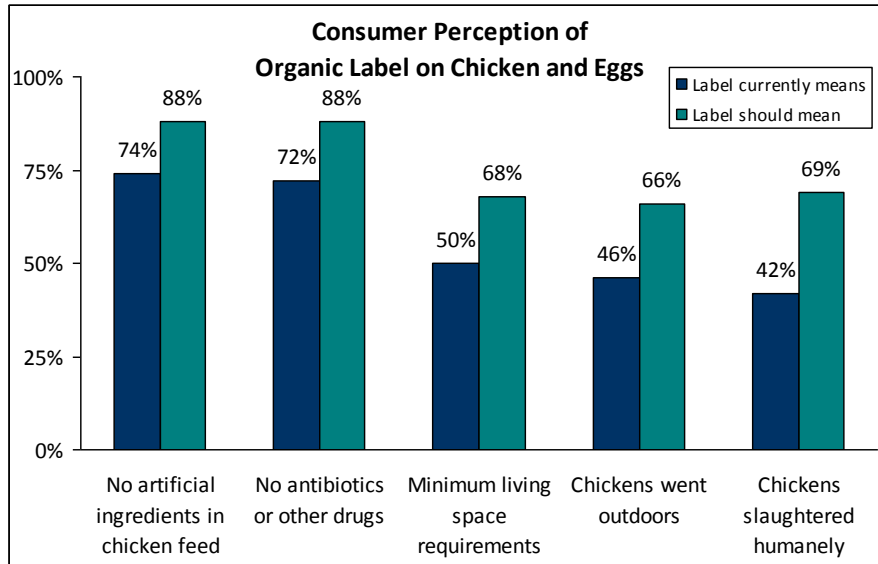
There is a difference between what consumers think the organic label on fruits and vegetables *currently* means, and what they *want* this label to mean. Most consumers believe that the organic label on produce *currently* means that no toxic pesticides were used (81%) and no antibiotics were used (66%). The vast majority of consumers feel that the organic label on produce *should* mean that no toxic pesticides (91%) and antibiotics were used (86%).



Consumers Think Changes Needed for Organic Labeling on Chicken and Eggs

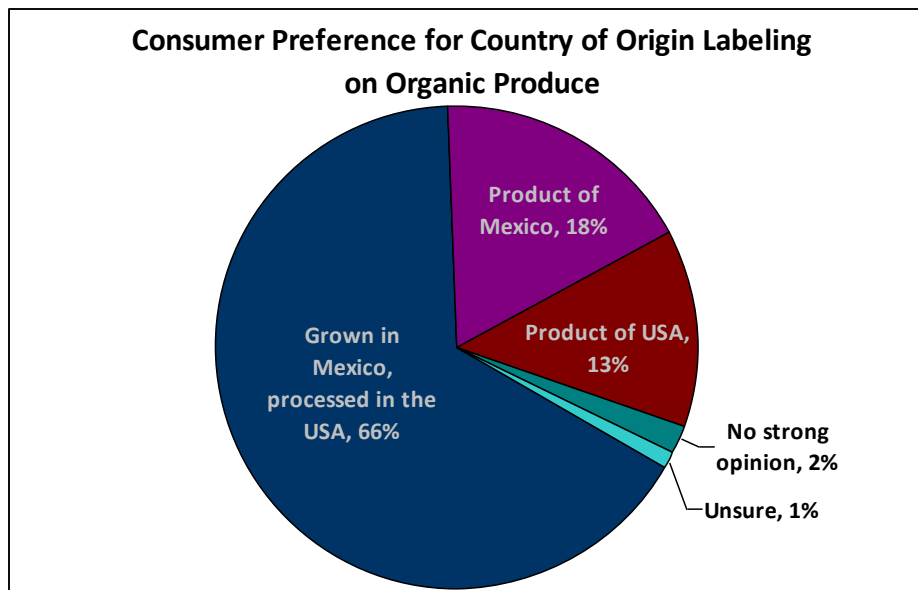
Consumers want changes to the organic label on chicken and eggs. The majority of consumers think that the organic label on chicken and eggs *currently* means that the chickens' feed contained no artificial ingredients (74%), and that no antibiotics or other drugs were used (72%). An even greater percentage of consumers believe this label *should* mean that the chickens' feed contained no artificial ingredients (88%) and that no antibiotics or other drugs were used (88%).

While only half of consumers believe that this label *currently* means that the chickens' living space met minimum size requirements, the majority (68%) feel this label *should* indicate this. In addition, while less than half of consumers think this label *currently* means that the chickens went outdoors (46% of consumers) and that the chickens were slaughtered humanely (42%), the majority believe this label *should* mean that the chickens went outdoors (66%) and that the chickens were slaughtered humanely (69%).



Consumers Want to Know if Their Organic Produce Is from a Different Country

The overwhelming majority of consumers (84%) want organic produce labeling to indicate if it came from outside the US. Consumers were asked about their preference for country of origin labeling on organic produce that came from a different country such as Mexico. The majority of consumers (66%) want origin labeling to include where the produce was grown *and* where it was processed. Some consumers (18%) want more stringent origin labeling; if the produce was grown in a different country, they believe this is the origin and the label should convey this. A small portion of consumers (13%) are more lenient and feel that if the produce is even processed in the US, the produce is a US product.



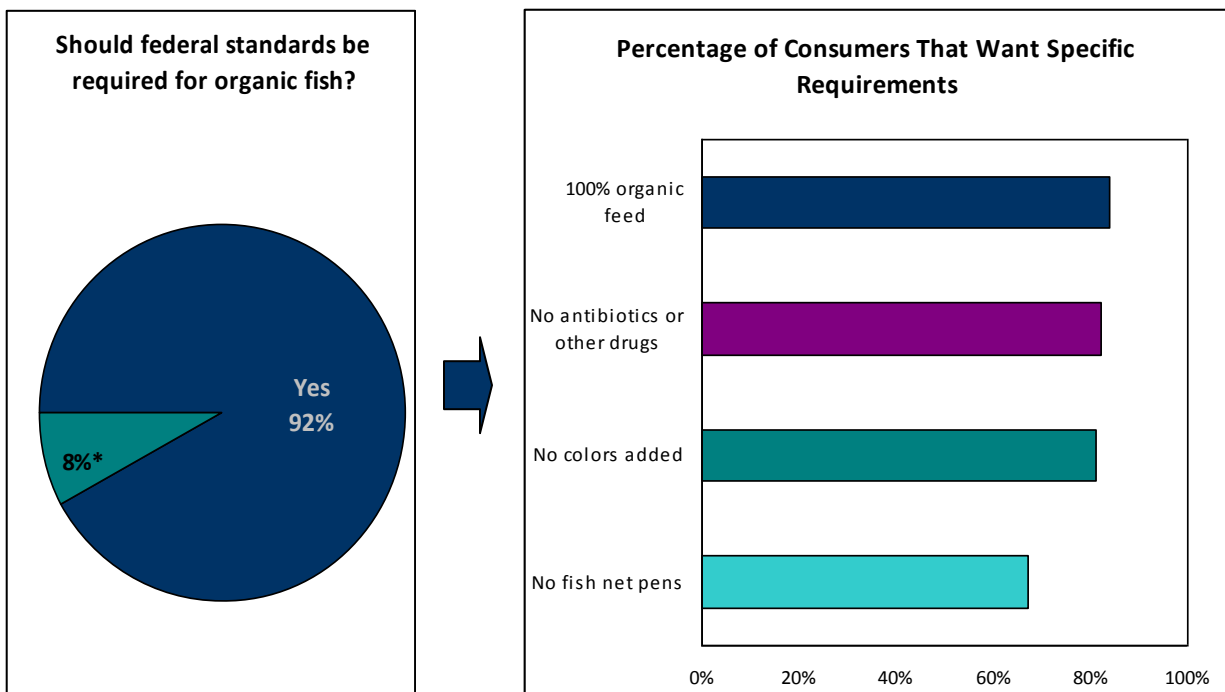
Most Consumers Are Not Buying Organic Fish

A notable portion of consumers (20%) are misguided in thinking that they have bought organic fish; the remaining consumers (75%) said they have not purchased organic fish.

Have you ever bought fish you believed was organic?	
	Respondents
Yes	20%
No	75%
Don't know/Unsure	5%

Consumers Want Federal Standards for Organic Fish

Nearly all consumers (92%) want at least one federal standard for organic fish. The overwhelming majority of consumers think federal standards for organic fish should require that: (1) 100 percent organic feed is used (84%), (2) no antibiotics or other drugs are used (82%), and (3) no colors are added (81%). A sizable portion of consumers (67%) want federal standards to also include that no fish net pens are used. Even when consumer response was broken down by frequency of organic food purchasing (*every week, 2-3 times a month, once a month, rarely*), these findings remained relatively consistent.



* Includes the following responses: No strong opinion, None of these, Don't know/Unsure

Should federal standards for fish labeled 'organic' require any of the following?						
		How often consumer buys organic food				
	All Consumers	Every week	2-3 times month	Once a month	Rarely	Do not buy
100% organic feed	84%	86%	84%	90%	84%	76%
No antibiotics or other drugs	82%	87%	83%	79%	85%	73%
No colors are added	81%	82%	86%	81%	81%	74%
No fish net pens	67%	66%	68%	66%	70%	60%
No opinion	2%	1%	3%	0%	1%	7%
None of these	4%	3%	3%	2%	5%	3%
Don't know/Unsure	2%	2%	1%	2%	0%	4%

Consumers Want Strong Restrictions Placed on Artificial Ingredient Use in Organic Products

The majority of consumers (71%) want strong restrictions for artificial ingredient use in organic products; these consumers want approval for as few artificial ingredients as possible. In addition, a majority (60%) of consumers will endorse approval only if the ingredient poses no human or environmental safety concerns. Only a minority of consumers (28%) want more lenient restrictions; these consumers affirm the view that expanding the availability of organic products should steer artificial ingredient approval. Even when consumer response was broken down by frequency of organic food purchasing, these findings remained relatively consistent.

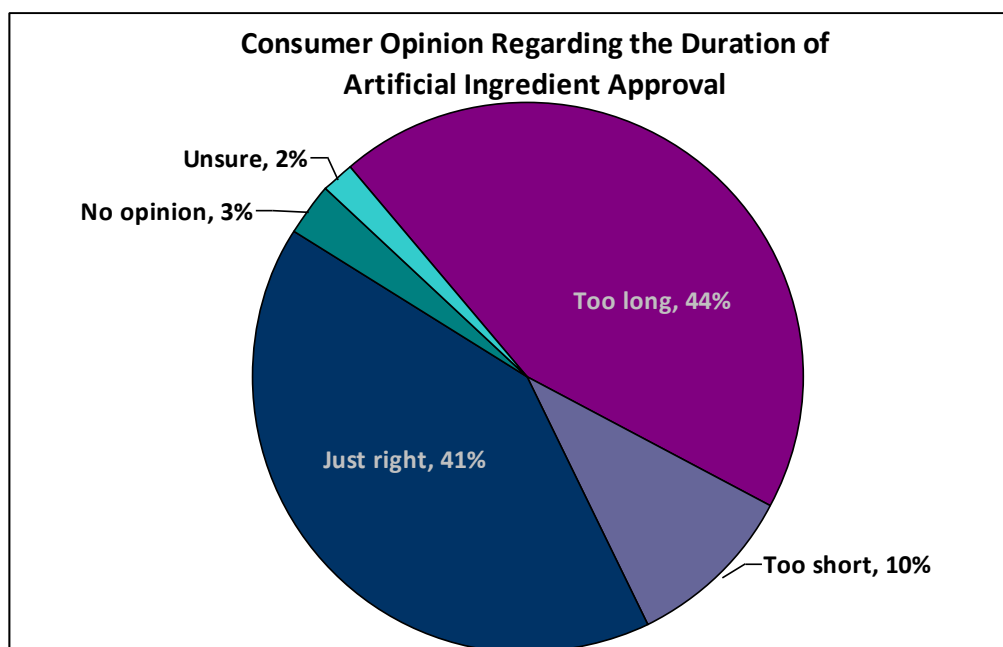
Government guidelines state that artificial ingredients may be approved for use in organic production. Which, if any, of the following do you think should steer these approvals?						
		How often consumer buys organic food				
	All Consumers	Every week	2-3 times month	Once a month	Rarely	Do not buy
As few artificial ingredients as possible	71%	70%	71%	74%	75%	63%
Only artificial ingredients without safety concerns	60%	58%	59%	62%	62%	55%
As many artificial ingredients as possible	28%	21%	26%	42%	27%	29%
No strong opinion	6%	5%	7%	5%	5%	11%
Don't know/Unsure	6%	9%	2%	7%	5%	9%

Consumers Think Artificial Ingredient Use Review a MUST

The vast majority of consumers (84%) feel *without* review, artificial ingredient use in organic products should be discontinued; accordingly, an overwhelming percentage of consumers (82%) think that continued use of artificial ingredients should be reviewed after 5 years. Few consumers (15%) endorse continued use of the artificial ingredient *without* review. Even when consumer response was examined by frequency of organic food purchasing, these findings remained relatively consistent.

In addition, many (44%) consumers think the 5-year approval timeframe is too long. On the other hand, a notable portion of consumers (41%) think this timeframe is just right. Few consumers (10%) feel that this timeframe is too short.

Artificial ingredients are approved for use in organic products for 5 year periods. In your opinion, which, if any, of the following should happen after that 5 year period?						
		How often consumer buys organic food				
	All Consumers	Every week	2-3 times month	Once a month	Rarely	Do not buy
Artificial ingredient use discontinued, if not reviewed	84%	86%	91%	87%	82%	78%
Continued artificial ingredient use should require review	82%	79%	86%	81%	87%	75%
Artificial ingredient use should continue without review	15%	13%	13%	15%	16%	18%
No strong opinion	3%	3%	2%	3%	1%	7%
Don't know/Unsure	2%	1%	0%	3%	1%	2%



Summary

Sales of organic food in the US have increased exponentially in the past decade. Our study found that the majority of US consumers buy organic food; thus, how this food is labeled directly affects most of the US population. Our findings suggest that when it comes to organic food labeling the general theme is that consumers demand more! More information, more regulation, more standards. If their organic produce is from a different country, consumers want information about this on the labeling. If organic fish will be developed, consumers want standards for this. If artificial ingredients will be used in organic products, consumers demand regulations and periodic review of these ingredients. Increased standardization of organic food labeling is something consumers want and need.

Methodology

This phone survey was fielded by ORC using a nationally-representative sample. The survey fielded between March 27th and March 30th. The margin of error is +/- 3.0 percentage points at a 95% confidence level. The margin of error may be higher for subgroup analysis.

Appendix: Tables

Q1: How often do you TYPICALLY buy food labeled 'organic'?	
	Respondents
<i>Buy organic food (Net)</i>	84%
Every week	18%
2-3 times a month	18%
Once a month	9%
Rarely (less than once a month)	39%
I do not buy organic food	15%
Don't know/Unsure	1%

Q2: Do you THINK that the 'organic' label on FRUITS and VEGETABLES means any of the following?			
	Respondents		
	Yes	No	Unsure
No toxic pesticides were used	81%	16%	3%
No antibiotics were used	66%	29%	5%

Q3: In your opinion, SHOULD the 'organic' label on FRUITS and VEGETABLES mean any of the following?	
	Respondents
No toxic pesticides were used	91%
No antibiotics were used	86%
None of these	6%
Don't know/Unsure	2%

The 'organic' label on FRUITS and VEGETABLES: difference between CURRENTLY means and SHOULD mean			
	Currently	Should	Difference*
No toxic pesticides were used	81%	91%	10 pp
No antibiotics were used	66%	86%	20 pp

*Difference = Should - Currently

Q4: Do you THINK that the 'organic' label on CHICKEN and EGGS means any of the following?			
	Respondents		
	Yes	No	Unsure
The chickens' feed contained no artificial ingredients	74%	23%	4%
No antibiotics or other drugs were used throughout the life of the chicken, including in the egg and the first day of life	72%	24%	4%
The chickens' living space met minimum size requirements	50%	44%	6%
The chickens went outdoors	46%	49%	5%
The chickens were slaughtered humanely	42%	50%	8%

Q5: In your opinion, SHOULD the 'organic' label on CHICKEN and EGGS mean any of the following?	
	Respondents
The chickens' feed contained no artificial ingredients	88%
No antibiotics or other drugs were used throughout the life of the chicken, including in the egg and the first day of life	88%
The chickens' living space met minimum size requirements	68%
The chickens went outdoors	66%
The chickens were slaughtered humanely	69%
None of these	2%
Don't know/Unsure	2%

The 'organic' label on CHICKEN and EGGS: difference between CURRENTLY means and SHOULD mean			
	Currently	Should	Difference
The chickens' feed contained no artificial ingredients	74%	88%	14 pp
No antibiotics or other drugs were used throughout the life of the chicken, including in the egg and the first day of life	72%	88%	16 pp
The chickens' living space met minimum size requirements	50%	68%	18 pp
The chickens went outdoors	46%	66%	20 pp
The chickens were slaughtered humanely	42%	69%	27 pp

**Difference = Should - Currently*

Q6: If FRUITS or VEGETABLES were grown in a different country, such as Mexico, and then cut, steamed and packaged in the United States, which of the following labels would you prefer to convey this?	
	Respondents
Grown in Mexico, processed in the USA	66%
Product of Mexico	18%
Product of USA	13%
I do not have a strong opinion about this	2%
None of these	0%
Don't know/Unsure	1%

Q7: Have you ever bought fish you believed was organic?	
	Respondents
Yes	20%
No	75%
Don't know/Unsure	5%

Q8: Should federal standards for fish labeled 'organic' require any of the following?	
	Respondents
<i>Any (Net)</i>	92%
100% organic feed is used	84%
No antibiotics or other drugs are used	82%
No colors are added	81%
No fish net pens in the ocean - which allow for the exchange of materials such as waste, chemicals and small wild fish - are used	67%
I do not have a strong opinion about this	2%
None of these	4%
Don't know/Unsure	2%

Q9: Government guidelines state that artificial ingredients may be approved for use in organic production. Which, if any, of the following do you think should steer these approvals?	
	Respondents
As few artificial ingredients as possible should be approved for organic production	71%
Only artificial ingredients without human or environmental safety concerns should be approved	60%
As many artificial ingredients as possible should be approved to expand the availability of organic products	28%
I do not have a strong opinion about this	6%
Don't know/Unsure	6%

Q10: Artificial ingredients are approved for use in organic products for 5 year periods. In your opinion, which, if any, of the following should happen after that 5 year period?	
	Respondents
Use of the artificial ingredient should be discontinued, if not reviewed, after 5 years	84%
Continued use of the artificial ingredient should require review after 5 years	82%
Use of the artificial ingredient should continue to be allowed, without review, after 5 years	15%
I do not have a strong opinion about this	3%
Don't know/Unsure	2%

Q11: Artificial ingredients are approved for use in organic products for 5 years. Do you think that length of time is...	
	Respondents
Too long	44%
Too short	10%
Just right	41%
I do not have a strong opinion about this	3%
Don't know/Unsure	2%