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Food Biotechnology: A Study of U.S. Consumer Attitudinal Trends, 2007 REPORT

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EXECUTIVE SUMMARY

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Amidst a year of heightened media attention on food concerns, awareness and perception of plant biotechnology remain stable, with few consumer concerns about usage in food. While awareness of animal biotechnology also remains stable in 2007, overall impressions, reactions to benefits, and purchase intent all improved somewhat if products produced using biotechnology are FDA-approved, suggesting consumers are growing less wary of animal biotechnology in particular. Consumer confidence in the safety of the U.S. food supply remains high, although there has been some erosion among those who report they are "very confident" in the safety of the food supply. When asked about "sustainable food production," most had not heard of it; however, once the concept was explained to consumers, they viewed it as important. With more than a decade of trending data, it is clear that awareness correlates with acceptance in these issue areas. Therefore, the need for communication of credible, science-based information about food biotechnology remains strong.

METHODOLOGY

The International Food Information Council (IFIC) commissioned Cogent Research to conduct the 12th in a series (1997 - 2007) of quantitative assessments of consumer attitudes toward food biotechnology. One thousand adults living in the

U.S. were surveyed via the web during July 2007. Based on the survey design, sampling error is $\leq 3.1\%$ and statistical significance is set at the 95% confidence level. In order for the sample to be nationally representative, all data are weighted according to U.S. Census data.

The purpose of this consumer research is to:

- Track public awareness and perceptions of plant and animal biotechnology
- Understand attitudes about confidence in the U.S. food supply and food labeling
- Uncover emerging opinions on "sustainable food production"

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RESULTS

Awareness and perceptions of plant biotechnology are stable, with concerns about usage in food production low.

Similar to past years, about three-quarters of consumers say they have heard or read at least "a little" about food biotechnology. Yet, only 23 percent of consumers believe biotech foods are currently available in supermarkets.

While most consumers are not sure about the future potential of biotech food (54%), 33 percent believe applied food biotechnology will provide benefits to them and their family within five years, particularly in the areas of nutrition and health. Specifically, awareness of benefits such as providing more healthful fats, reducing saturated fat content or creating better tasting food, drives biotechnology favorability.

Ninety-five percent of consumers will not take any actions because of concerns they may have about food produced using biotechnology. Among the remaining five percent who would take action, half would alter their purchasing behavior. Interestingly, the altered purchasing behavior correlates with low awareness levels of food biotechnology.

Awareness of animal biotechnology remains stable in 2007 after experiencing declines in 2005 and 2006; more specifically, overall impressions, reactions to benefits, and purchase intent have all improved somewhat over the past year.

Fewer Americans hold positive perceptions of animal biotechnology than plant biotechnology; however, favorable perceptions of animal biotech are significantly on the rise, with 24 percent viewing the technology as favorable this year compared to 19 percent in 2006. Nonetheless, 53 percent are still neutral or do not know enough to form an opinion in their own estimation, suggesting educational outreach is still needed.

Consistent with last year, about two-thirds of consumers had a positive reaction to the benefits of animal biotechnology in the areas of quality and safety of food. Further, farm efficiencies designed to increase the amount of food produced or decreasing the amount of feed needed by animals and environmental benefits relating to animal waste in particular all positively impressed over half of consumers in 2007.

Although impressions of genomics and genetic engineering held firm in 2007, consumer impressions of animal cloning and using cloned animals for breeding climbed significantly this year, suggesting consumers are growing less wary of the technology. Specifically, 35 percent of consumers, the same percentage as in 2006, hold a favorable view of "genetic engineering." This year, 22 percent polled held a favorable view of the use of "animal cloning," up significantly from last year when only 16 percent held this view. However, those who had an unfavorable response to animal cloning (50%) or were neutral (28%) still represent the majority.

While 22 percent of consumers perceived cloning in a favorable light (see previous paragraph), this percent jumps to 46 percent if the FDA determined that foods from cloned animals were safe. Similarly, 25 percent of consumers hold a favorable view of using cloned animals for breeding, with 49 percent of consumers, nearly double, likely to purchase foods from the offspring of cloned animals if FDA safety determinations were offered. Clearly, the role of FDA safety determinations should not be underestimated.

Consumer confidence in the safety of the U.S. food supply remains high; however, the percent that are "very" confident has eroded somewhat over the past year.

While only about 10 percent of the U.S. population say they are "not confident" in the safety of the food supply, the number who say they are "very confident" has dropped from 21 percent last year to 15 percent this year. Disease/contamination, food handling, and food sources are the areas of greatest concern, with "food sources" rising from six percent in 2006 to 20 percent in 2007 among those stating a concern.

As in previous years, about 60 percent of those surveyed say they avoid certain kinds of foods or food ingredients; sugars/carbohydrates top this list with fats/oils/cholesterol a close second. Notably, less than one percent state they avoid biotech foods.

Satisfaction with the information provided on food labels remained high in 2007. Only 16 percent of consumers could think of information they believe should be added to the current food label – less than one percent of whom mentioned biotechnology. In fact, a majority of Americans continue to either "support" (61%) or hold neutral views (24%) regarding current biotech labeling regulations.

Although most Americans have not heard about "sustainable food production," the concept is one that resonates with nearly all consumers once explained.

Seventy percent of consumers have heard "nothing" about sustainable food production. Yet, nearly two-thirds say they believe sustainable food production is important when defined as the ability to "operate in a manner which does not jeopardize the availability of resources for future generations." When asked to rank five factors relating to sustainable food production, increasing the world food supply and reducing the amount of pesticides needed to produce food are seen to be the most important benefits to consumers.

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SUMMARY & CONCLUSION

Although favorability of animal biotechnology still lags behind that of plant biotechnology, 2007 marks a potential turning point where consumers appear less wary of animal biotechnology than in previous years. Further, these data suggest that assurances and safety determinations from the FDA would yield significantly increased consumer confidence in the area of food produced through animal cloning in particular. Despite a decrease among the "very confident," consumers remain confident in the safety of the U.S. food supply. Finally, sustainable food production is an emerging concept that is not well understood at present but heavily supported once defined and explained to consumers.

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