

2015 Global GMO Report

An In-Depth Look at Global Shopper Views on Genetic Modification

Detailed Outline

➤ **Background:**

Recent media exposure and legislative debate have brought genetic modification to the attention of consumers across the globe—inciting some concerns regarding health, safety and environmental impact. Consumers are hearing from both sides of the argument—on one hand supporters claim GMOs provide benefits such as feeding the world and improving crop yields, yet the opposing side argues that the long-term effects of genetic modification are unknown and asserts that GMOs are dangerous. These debates have caused much confusion among many consumers.

In this latest comprehensive research report, HealthFocus International explores the topic of genetic modification on a global scale across 16-key countries. The report provides a better understanding of exactly where shoppers stand on GMOs and helps guide companies in their communications and product development.

➤ **Countries Included:**

- AMERICAS: USA, Canada, Brazil, Mexico
- EUROPE: France, Germany, Italy, Russia, Spain, UK
- ASIA/PACIFIC: Australia, China, Japan, India, Indonesia, Philippines

➤ **Primary Objectives:**

- Provide a complete education on shopper understanding of genetic modification
- Determine how to effectively address genetic modification in food and beverage communications
- While remaining realistic that the issue of genetic modification is a battle—understand how might there be inroads to get through the GMO minefield with shoppers and potentially gain some acceptability

➤ **Report Overview:**

- The Status of GMOs Globally
- Executive Summary
- GMO Free Positioning in the Marketplace
- GMO Awareness and Concern
- Shopper Opinions on GMOs
- Environmental Impact and Safety

- GMO Labeling
- Understanding Non-GMO Shoppers

➤ Topics Covered:

- **GMO Awareness and Concern**
 - How does awareness and concern vary by country?
 - Is there still concern among shoppers from less aware regions?
 - Where does GMO concern fall compared to 20 food and ingredient concerns (e.g., pesticides, preservatives, growth hormones and antibiotics in dairy, artificial ingredients, sugar, sodium, trans-fats, etc.).
 - What is fueling GMO concern?
- **Shopper Opinions on GMOS**
 - Do shoppers believe food grown from genetically modified crops are bad for them?
 - Do shoppers think all genetic modification is bad?
 - Do they think genetic modification of crops is necessary to ensure that we can grow enough food globally?
 - How do shoppers rate genetically modified foods compared to non-GMO foods? Are GMOs viewed as better, the same or worse in terms of health, safety, environmental impact and taste?
 - To what degree does using no GMOs make foods and beverages seem healthier? How does using no GMOs compare to other changes to improve products—such as reducing “negatives” like fat, sugar and additives and adding “positives” like organic, locally-made, using recognizable ingredients, etc.?
- **Environmental Impact and Safety**
 - Do shoppers think GMOs are better, the same or worse for the environment compared to non-GMO foods?
 - How strong of an impact do environmental issues have on their food selection?
 - How do they think GMOs compare to non-GMOs in terms of how safe they are to eat?
 - How big of a concern are pesticides in foods? Where does pesticide concern rank among 20 food and ingredient concerns?
 - How concerned are shoppers about preservatives in foods?
- **GMO labeling.**
 - Do shoppers think that foods containing GM ingredients should be labeled?
 - When shopping for foods, how important is “GMO-free” labeling to shoppers?
 - Where does “GMO-free” labeling rank compared to other popular labels such as no artificial sweeteners, flavors and colors, low fat, high protein, good source of fiber, etc.
 - In which countries is “GMO-free” labeling growing in importance?

➤ Understanding Non-GMO Shoppers

- Looking at the Global Market, HealthFocus grouped the respondents based on how they responded to certain questions about GMOs to identify and better understand the non-GMO shopper group. The primary non-GMO shopper group was identified as a segment of shoppers that is both highly concerned about GMOs and places high importance on “GMO free” labels. All groups are sized by country.
 - HealthFocus took a deeper look at this non-GMO group to answer questions such as:
 - Who are the primary non-GMO shoppers?
 - What is fueling this group? Uncovering key areas of interest to determine what drives this group—are they just concerned about GMOs or is non-GMO just one of the things that this group is looking for? What are the key brand influences for this group?
 - What is their approach towards health and nutrition and how does it differ from other shoppers? Are they more discerning—going out of their way to learn about health and nutrition and more often reading labels?
 - How healthy is this group? Are they more willing to sacrifice taste and convenience for health?
 - How important are organics to these shoppers?
 - Where does this group stand on environmental issues?
 - Are they more concerned about pesticides and toxins than other shoppers?