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**Findings From A National Survey Of
Likely 2016 General Election Voters
November 2015**



THE
MELLMAN
Group
RESEARCH
BASED
STRATEGY

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Key Findings

- **GMOs Are Not Well Regarded**
- **Most Want Tougher Regulations On GMOs**
- **Voters Overwhelmingly Support Requiring Labels On GMO Foods**
- **Voters Overwhelmingly Prefer Printed GMO Labels Over Bar Codes**
- **A Huge Majority Wants To Prohibit The Gathering Of Information About Customers When They Scan For GMO Information**
- **Bar And QR Codes Are Rarely Used**

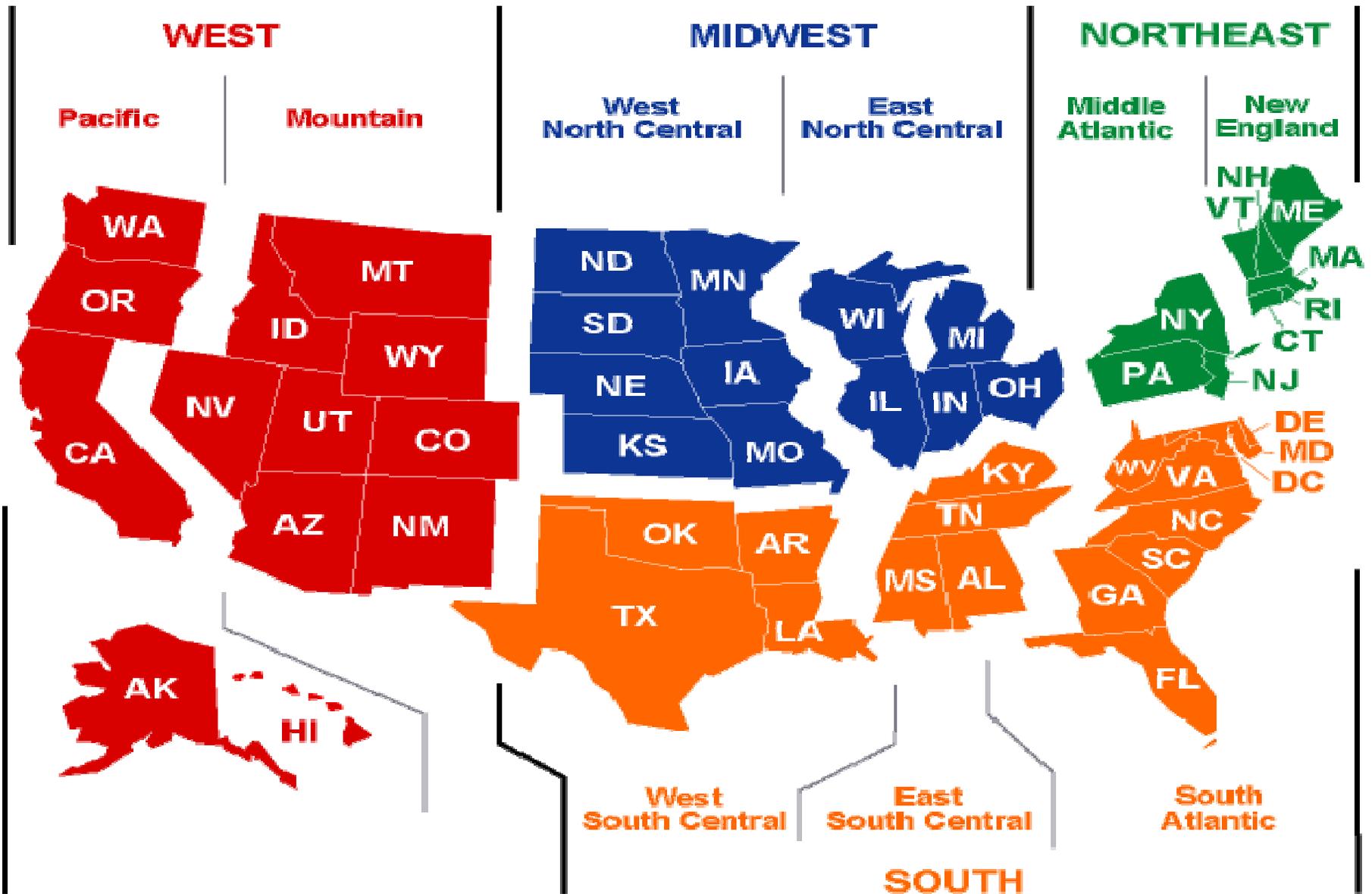


Methodology

- Survey of 800 Likely 2016 General Election Voters Nationwide
- Interviews conducted November 16-19, 2015
- Margin of error +/- 3.4% (higher for subgroups)



Census Region And Divisions





GMOs Are Not Well Regarded

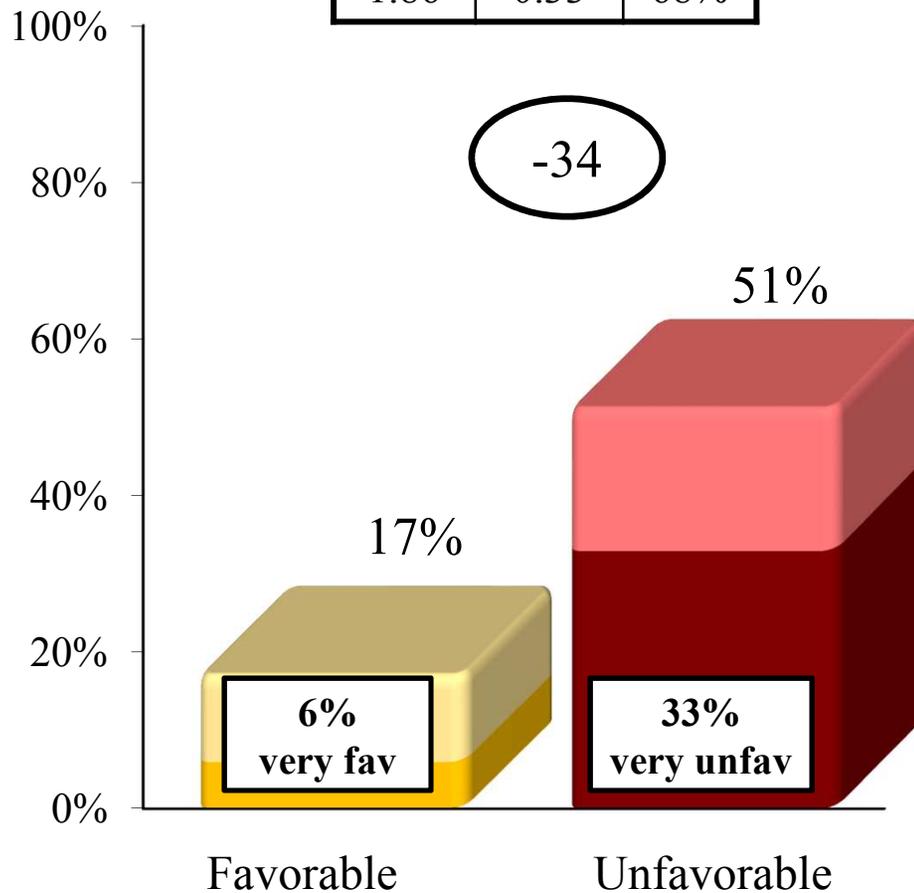




GMOs Are Viewed Quite Unfavorably

GMO Favorability

Mean	Ratio	ID
1.86	0.33	68%



By Key Group	Favorable	Unfavorable
Democrat ID	16%	57%
Independent ID	16%	57%
Republican ID	19%	38%
Young Women	19%	58%
Young Men	17%	56%
Older Women	14%	49%
Older Men	19%	41%
HS or Less	12%	31%
Some College	17%	56%
College+	20%	57%
White	19%	51%
Black	9%	45%
Hispanic	24%	45%
Northeast	13%	57%
Midwest	16%	48%
South	21%	46%
West	16%	56%
Have Smartphone	20%	54%
Don't Have Smartphone	12%	45%
Primary Groc Shopper	16%	50%





Most Want Tougher Regulations On GMOs



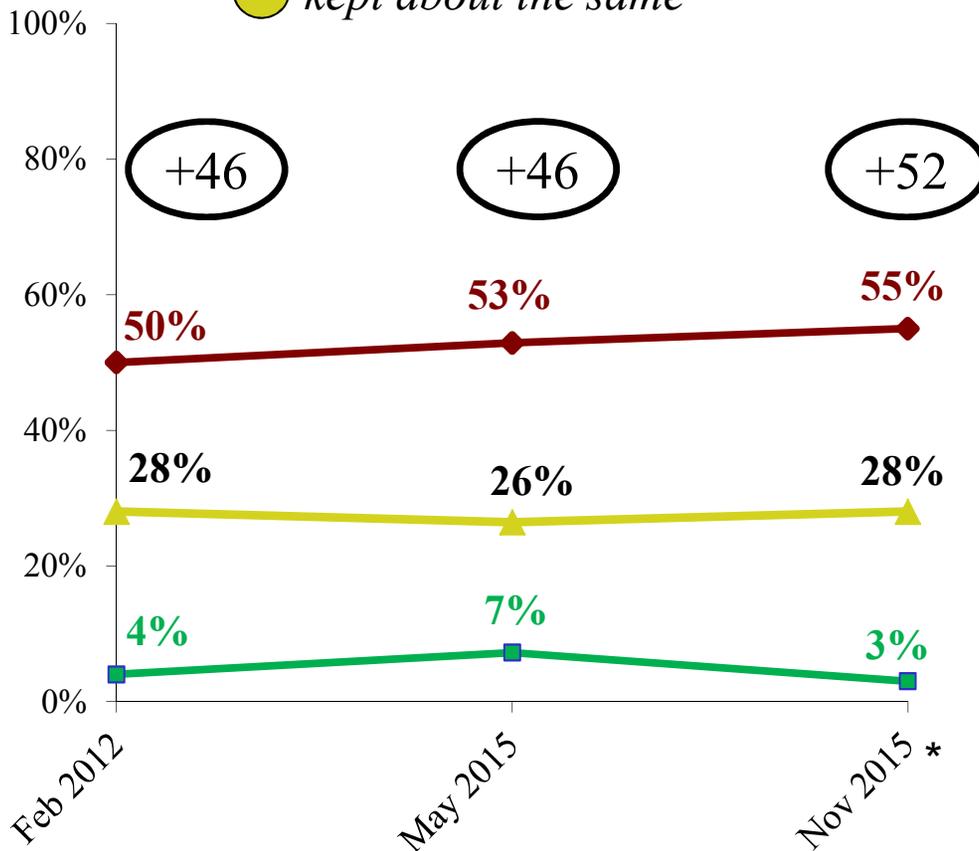
A Growing Majority Favor Stricter Regulation Of GMOs

In Every Segment At Least A Plurality Favor Stricter Regulations

Which of the following comes closer to your point of view?

Do you think regulations on genetically modified foods should be made...

- more strict
- less strict
- kept about the same



By Key Group	More	Same	Less
Democrat ID	58%	22%	2%
Independent ID	60%	23%	4%
Republican ID	47%	38%	4%
Young Women	58%	28%	5%
Young Men	51%	34%	3%
Older Women	62%	21%	1%
Older Men	46%	29%	5%
HS or Less	47%	29%	2%
Some College	62%	25%	3%
College+	55%	29%	3%
White	54%	30%	3%
Black	68%	19%	1%
Hispanic	49%	24%	5%
Northeast	71%	18%	4%
Midwest	46%	34%	4%
South	49%	30%	2%
West	59%	24%	4%
Have Smartphone	57%	26%	4%
Don't Have Smartphone	52%	29%	2%
Primary Groc Shopper	55%	26%	3%

*Nov 2015 results likely voters. Previous results registered voters





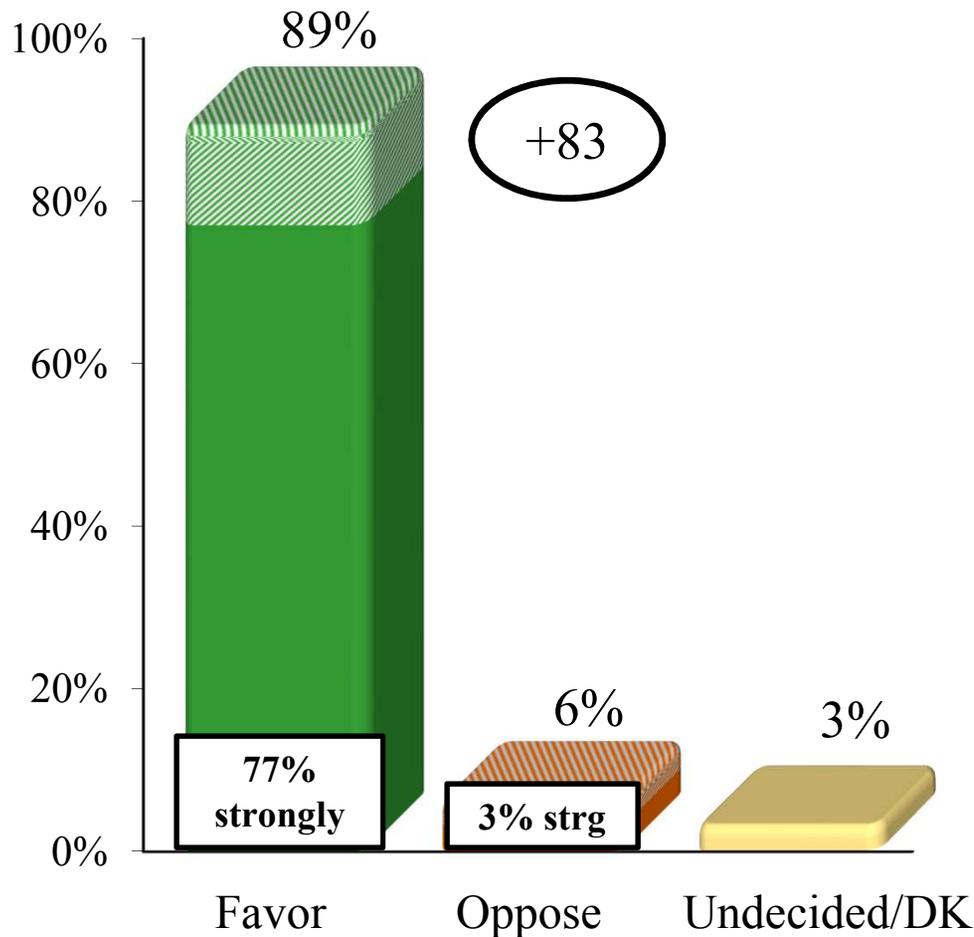
**Voters Overwhelmingly Support
Requiring Labels On GMO Foods**





Support For Requiring Labels On GMO Foods Is Overwhelming Across All Segments

Would you favor or oppose requiring labels for foods that have been genetically modified or contain genetically modified ingredients?



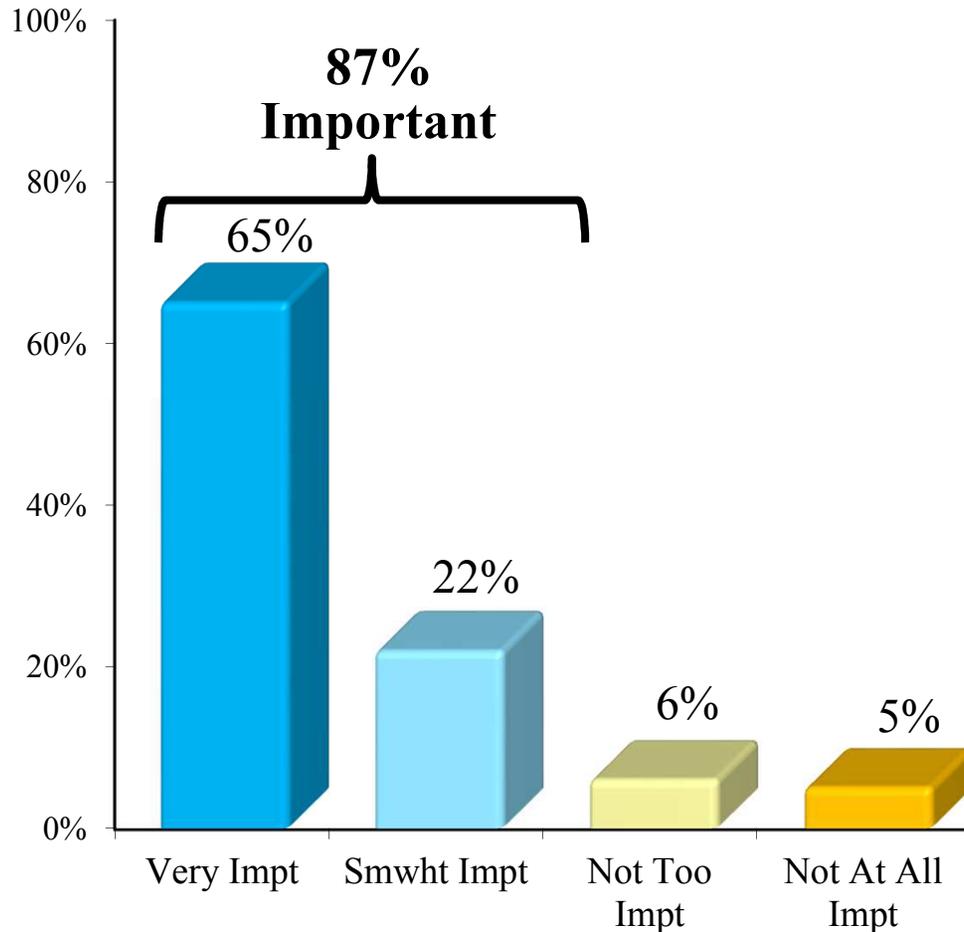
By Key Group	Favor	Oppose
Democrat ID	92%	2%
Independent ID	89%	7%
Republican ID	84%	7%
Young Women	88%	9%
Young Men	93%	2%
Older Women	92%	4%
Older Men	81%	6%
HS or Less	88%	6%
Some College	91%	5%
College+	89%	5%
White	88%	6%
Black	95%	1%
Hispanic	93%	5%
Northeast	91%	3%
Midwest	81%	9%
South	91%	4%
West	91%	5%
Have Smartphone	90%	5%
Don't Have Smartphone	86%	5%
Primary Groc Shopper	88%	6%





Nearly Nine-In-Ten Believe Labels Are Important, And A Large Majority Believe They Are Very Much So

How important is it to you that foods which have been genetically modified or contain genetically modified ingredients be labeled to indicate that?



By Key Group	Important	Not Impt
Democrat ID	91%	9%
Independent ID	89%	9%
Republican ID	82%	15%
Young Women	88%	12%
Young Men	87%	12%
Older Women	92%	6%
Older Men	80%	16%
HS or Less	88%	11%
Some College	94%	5%
College+	84%	13%
White	86%	12%
Black	98%	2%
Hispanic	88%	12%
Northeast	90%	9%
Midwest	84%	15%
South	86%	11%
West	90%	8%
Have Smartphone	87%	11%
Don't Have Smartphone	88%	11%
Primary Groc Shopper	88%	10%





**Voters Overwhelmingly Prefer Printed
GMO Labels Over Bar Codes**





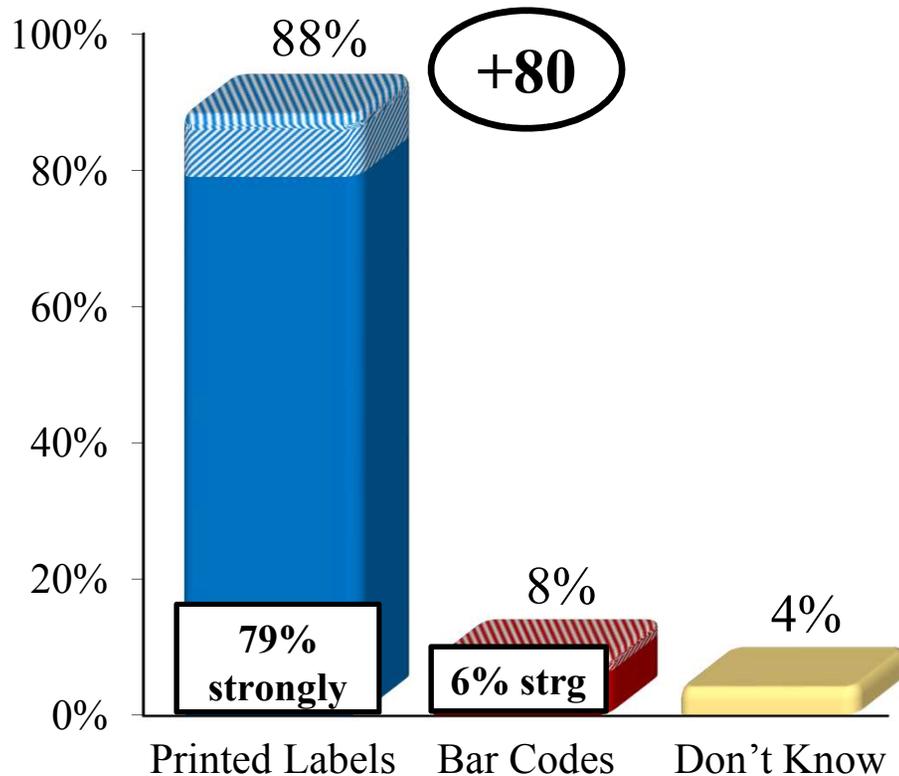
Almost Everyone Wants Printed Labels Rather Than Electronic Bar Codes

Would you prefer that labels indicating whether a food product at the grocery store contains genetically modified ingredients, or GMOs:

Be printed on the package in ways visible to the naked eye

OR

Be included in bar codes on the package that could be scanned using a smartphone app?



By Key Group	Printed Labels	Bar Codes
Democrat ID	88%	8%
Independent ID	90%	4%
Republican ID	88%	11%
Young Women	88%	11%
Young Men	85%	14%
Older Women	91%	3%
Older Men	89%	4%
HS or Less	86%	10%
Some College	88%	10%
College+	91%	6%
White	90%	7%
Black	94%	5%
Hispanic	82%	16%
Northeast	95%	4%
Midwest	86%	9%
South	85%	11%
West	92%	3%
Have Smartphone	88%	9%
Don't Have Smartphone	89%	6%
Primary Groc Shopper	89%	6%





A Huge Majority Wants To Prohibit The Gathering Of Information About Customers When They Scan For GMO Information





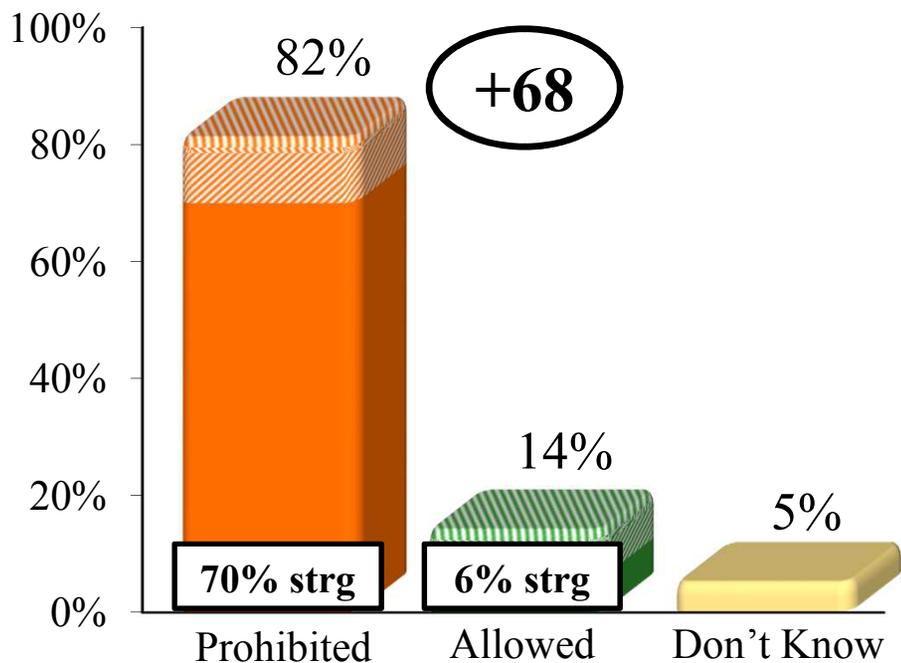
Most All Would Prohibit Companies From Collecting Data About Customers Who Scan Bar Codes For GMO Information

If food manufacturers were required by law to put bar codes on food packages that customers could scan with their smartphones to find out whether those foods contain genetically modified ingredients, do you think:

Food manufacturers should be prohibited from gathering information about customers – like their location and Product choices – when customers scan these barcodes on food packages for GMO information

OR

Food manufacturers should be allowed to gather information about customers – like their location and product choices – when customers scan these barcodes on food packages for GMO information



By Key Group	Prohibited	Allowed
Democrat ID	81%	14%
Independent ID	84%	11%
Republican ID	81%	16%
Young Women	80%	15%
Young Men	82%	14%
Older Women	85%	10%
Older Men	78%	17%
HS or Less	78%	16%
Some College	84%	12%
College+	83%	13%
White	84%	13%
Black	78%	18%
Hispanic	78%	9%
Northeast	84%	12%
Midwest	82%	15%
South	81%	14%
West	79%	14%
Have Smartphone	82%	14%
Don't Have Smartphone	81%	14%
Primary Groc Shopper	83%	13%





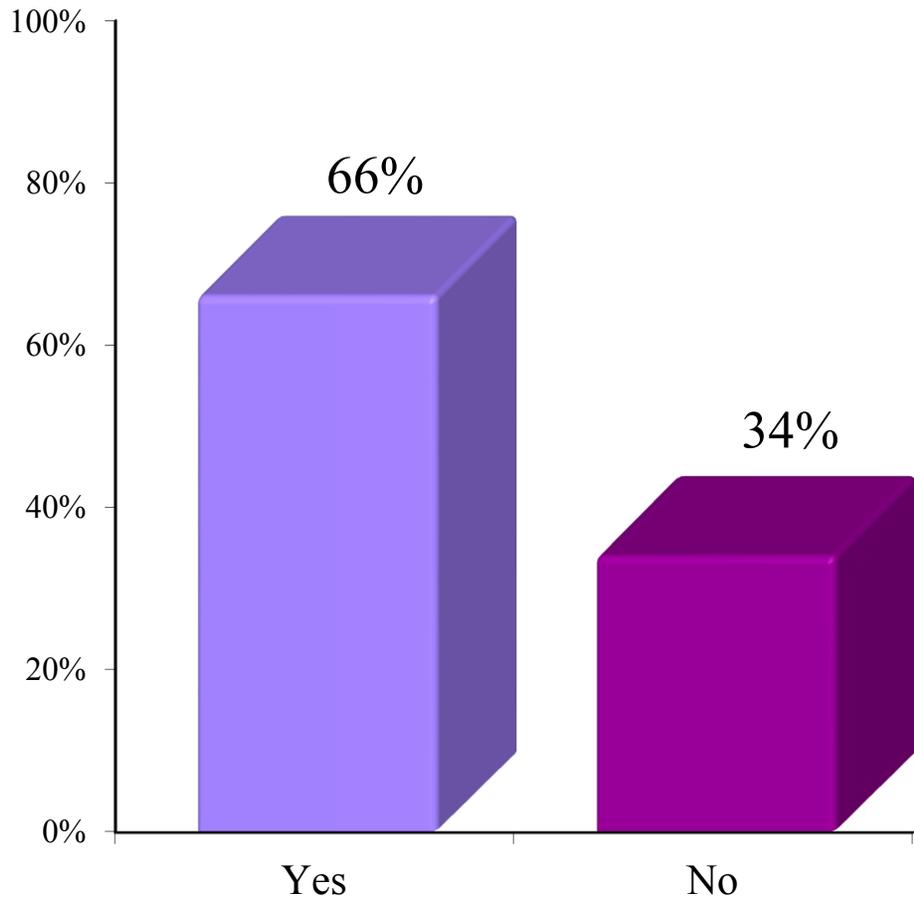
Bar And QR Codes Are Rarely Used





Two-Thirds Have A Smartphone

Do you personally have a mobile phone with a camera and a touchscreen visual display, also known as a smartphone?



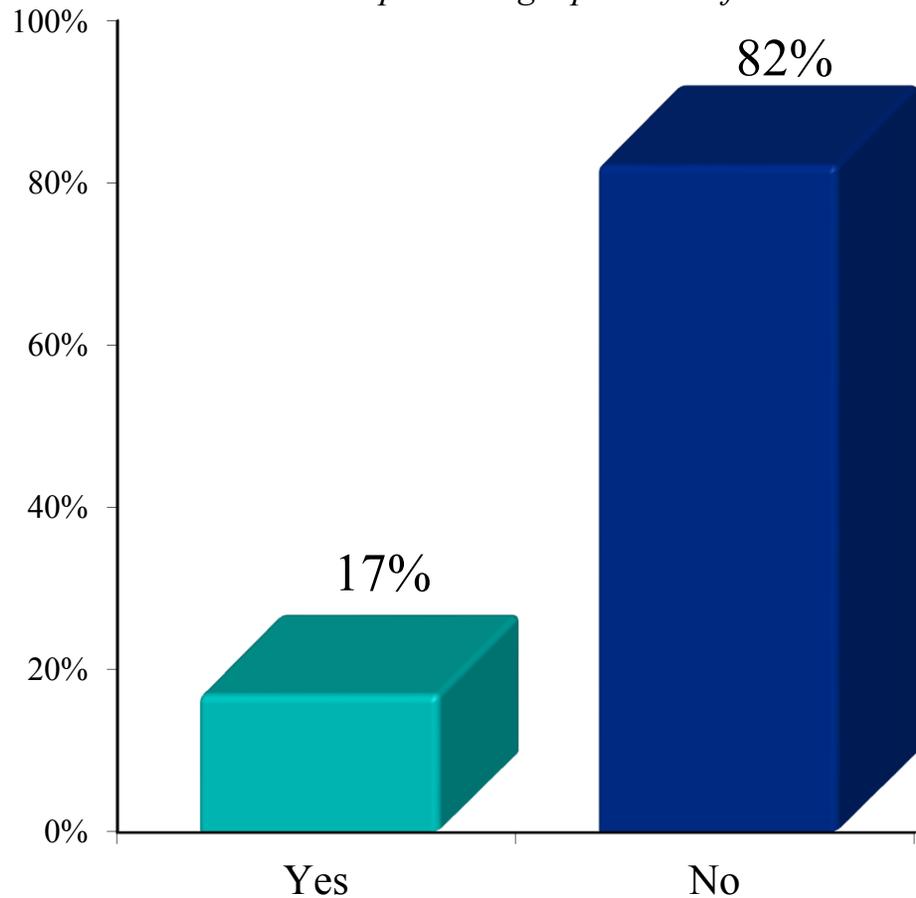
By Key Group	Yes	No
Democrat ID	67%	32%
Independent ID	65%	33%
Republican ID	64%	36%
Young Women	86%	14%
Young Men	83%	14%
Older Women	49%	50%
Older Men	50%	50%
HS or Less	38%	61%
Some College	72%	27%
College+	75%	24%
White	65%	34%
Black	62%	37%
Hispanic	71%	29%
Northeast	64%	35%
Midwest	61%	39%
South	63%	36%
West	76%	22%
Primary Groc Shopper	66%	34%





But Few In Any Segment Have Ever Scanned A Bar Code With A Smartphone To Get Product Information

Grocery stores use bar codes to enable people to check out themselves and also to provide information about products for sale in the store. Thinking only about getting information, and not about checking yourself out, have you ever scanned a barcode in a grocery store with a smartphone to get product information?



By Key Group	Yes	No
Democrat ID	17%	82%
Independent ID	15%	83%
Republican ID	18%	81%
Young Women	24%	76%
Young Men	29%	70%
Older Women	10%	89%
Older Men	8%	91%
HS or Less	9%	90%
Some College	15%	84%
College+	22%	77%
White	17%	83%
Black	23%	74%
Hispanic	19%	81%
Northeast	15%	85%
Midwest	21%	79%
South	16%	83%
West	17%	81%
Have Smartphone	24%	75%
Don't Have Smartphone	3%	97%
Primary Groc Shopper	18%	82%

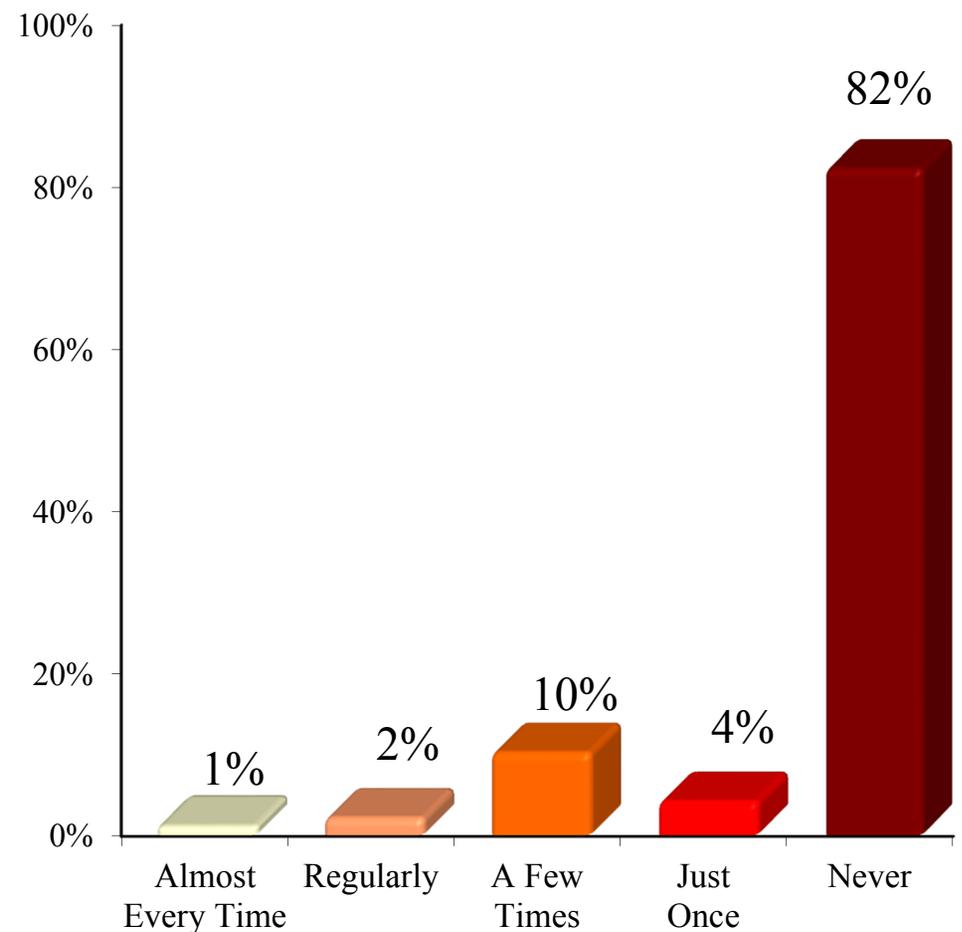
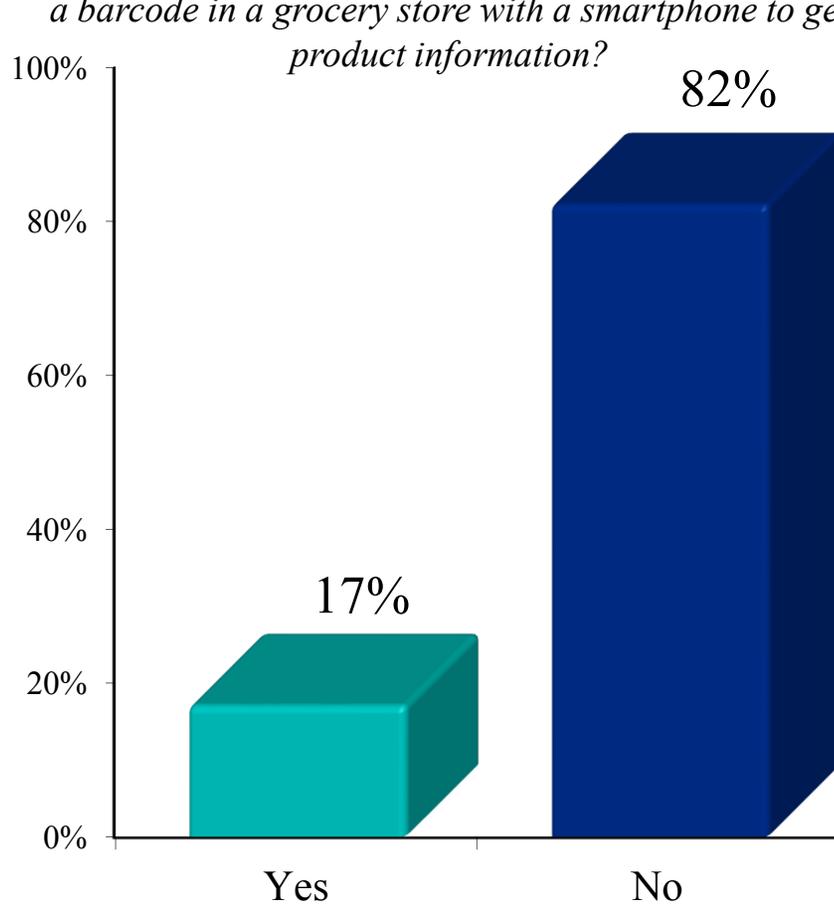




Almost No One Scans Bar Codes For Product Information With Any Regularity

Grocery stores use bar codes to enable people to check out themselves and also to provide information about products for sale in the store. Thinking only about getting information, and not about checking yourself out, have you ever scanned a barcode in a grocery store with a smartphone to get product information?

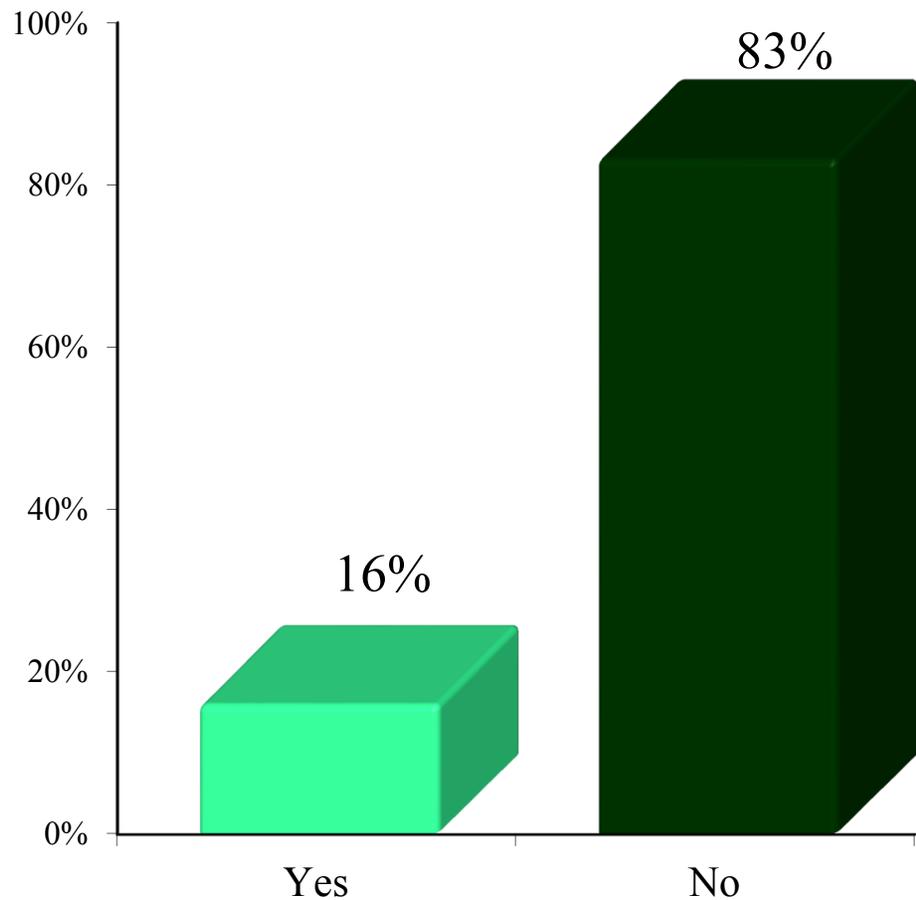
How often, if ever, have you scanned a barcode in a grocery store to get product information?





A Similarly Small Number Have Scanned A QR Code For Product Information

Have you ever scanned a QR code, also known as a “Quick Response” code, in a grocery store to get information about a product?



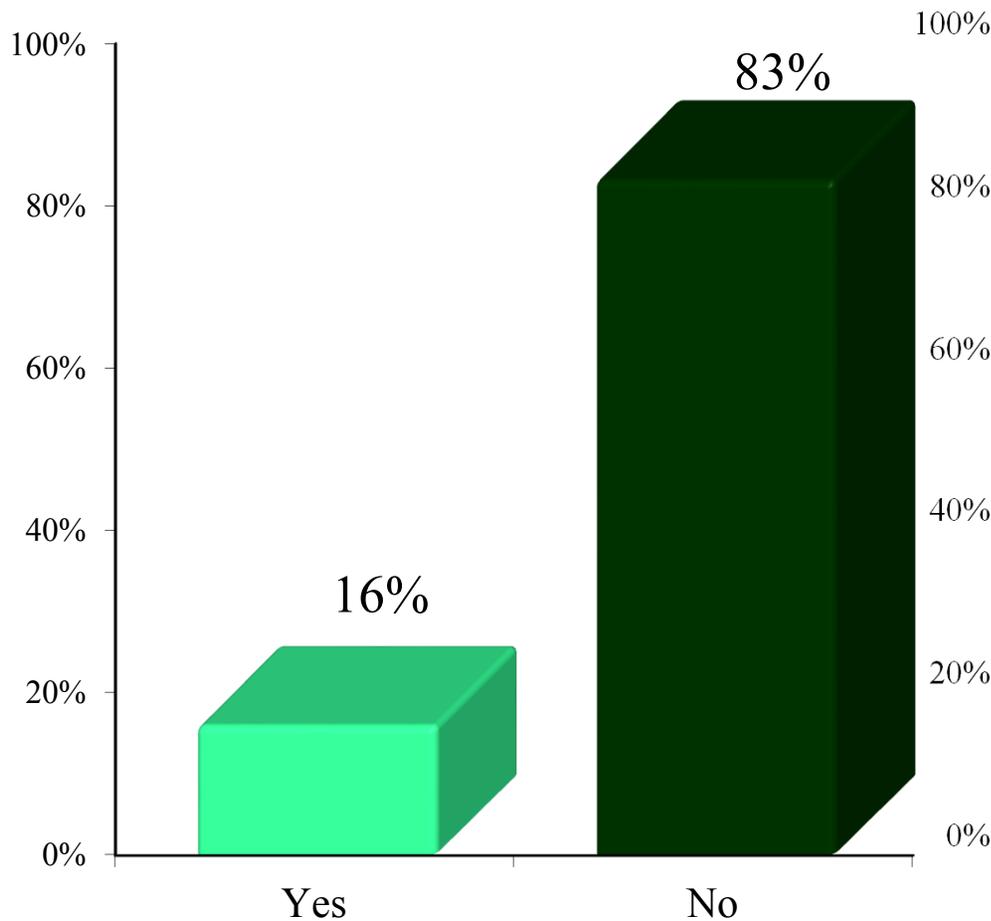
By Key Group	Yes	No
Democrat ID	16%	84%
Independent ID	15%	84%
Republican ID	18%	82%
Young Women	19%	80%
Young Men	32%	67%
Older Women	8%	92%
Older Men	9%	91%
HS or Less	10%	89%
Some College	14%	85%
College+	20%	79%
White	15%	84%
Black	20%	80%
Hispanic	25%	75%
Northeast	19%	81%
Midwest	13%	86%
South	15%	84%
West	18%	81%
Have Smartphone	21%	78%
Don't Have Smartphone	5%	95%
Primary Groc Shopper	16%	83%



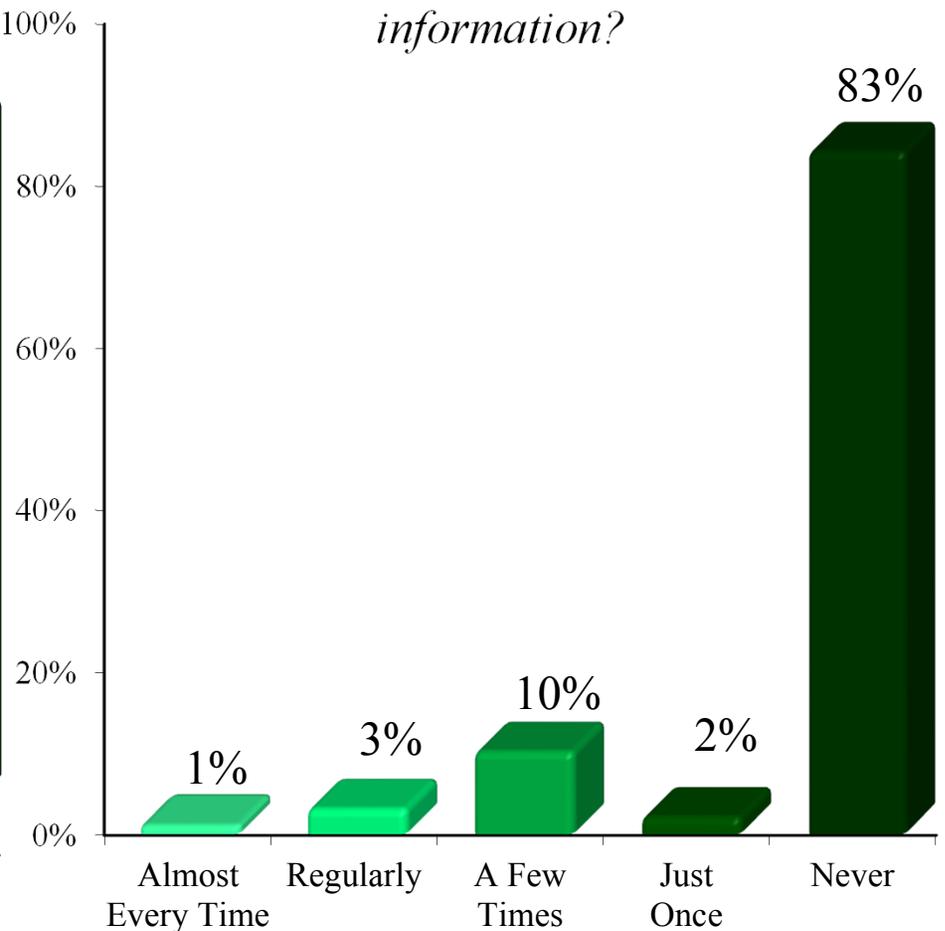


Almost No One Uses This Technology Regularly

Have you ever scanned a QR code, also known as a “Quick Response” code, in a grocery store to get information about a product?



If Yes, how often, if ever, have you scanned a QR code in a grocery store to get product information?



Strategic Conclusions

- **GMO foods remain unpopular**
- **Voters continue to want stricter regulations on GMOs**
- **Support for required labeling remains overwhelming**
- **Voters want printed labels, not scannable ones**
- **Voters do not want their shopping data collected when they scan a label**
- **Few now use scanned labels for product information**

