Cracking the Code on Food & Ag. Issues

Consumer Insights
Center for Food Integrity

Mission:
To build consumer trust and confidence in today’s food system.
Sierra Club
Why do They Trust Activists?

You are here

Reasonable majority is here

Extreme Activists are here
Who are the activists?

- **Human Rights & Environment**
  - Men are more passionate

- **Animals**
  - Women are more passionate

**Most Activists are**

- Women
- Between the ages of 21 - 44
Who are the activists?

One in three will support a boycott of certain businesses or products

Three in five are women
When Asked . . .

"Do you think of yourself as an active participant in the environmental movement, sympathetic toward the environmental movement but not active, neutral, or unsympathetic toward the environmental movement?"

- 51% put themselves in the "sympathetic" category
- 24% classify themselves as "neutral"
- 5% say they are "unsympathetic" toward the environmental movement.
Activists

AGE
- 30% of the participants are young
- 49% are middle age
- 21% are considered old

RACE
- 83% are white
- 12% are black
- 4% fall into the others category
Activists

GENDER

- 43% are male
- 57% are female

EDUCATION

- 17% have completed less than high school
- 58% have completed high school
- 25% have earned a bachelors degree or higher

Ranking of Issues

![Comparison of Causes Relative to Own Gender]

- Animals
- Human Rights
- Economic Justice
- Criminal Justice
- Environment
- Health
- Gay Rights
- Women's Rights
- Education
- Sustainable Food
- Immigrant Rights
- Human Trafficking

Percent of Signatures
Trust in Today’s Agriculture
1968

THE YEAR THAT SHAPED A GENERATION.
Significant Social Shifts: Last 40 Years

- The Battle of Chicago
- End The War In Vietnam
- Three Mile Island - 1979
- Exxon Valdez - 1989
- Iran Contra - 1986
- Jimmy Swaggert - 1988
- Jim Bakker - 1987
- Clinton Impeached
- Clinton Scandal - 1998
- Andersen
- Arthur Andersen - 2002
- Enron - 2000
Significant Social Shifts: Last 40 Years

**THEN**

- Authority is granted by office
- Broad social consensus driven by WASP males
- Communication is formal, indirect (mass communication)
- Progress is inevitable

**NOW**

- Authority is granted by relationship
- No single social consensus, great diversity, many voices
- Communication is informal, direct (masses of communicators)
- Progress is possible
Consolidation, Integration, Industrialization
CFI Trust Model

Trust research was published in December 2009 — Journal of Rural Sociology
What Drives Consumer Trust?

Shared values are 3-5x more important to building trust than sharing facts or demonstrating technical skills/expertise.
Sustainable Balance

Economically Viable
- ROI
- Demand
- Cost Control
- Productivity
- Efficiency
- Profitability

Scientifically Verified
- Data Driven
- Repeatable
- Measurable
- Specific

Knowledge

Ethically Grounded
- Compassion
- Responsibility
- Respect
- Fairness
- Truth

Value Similarity

Feelings

Belief

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What does all this mean?
When Science and Consumers Collide

Our Goal WAS:

Educate the consumer so they will logically understand and forget this nonsense.

Our Goal SHOULD BE:

To better understand how to introduce technical information about agriculture, so they are considered in the social decision-making process.

Understand the processes used by other consumer groups when forming attitudes and opinions about issues in agriculture and food.
Why Facts Alone Don’t Drive Decisions

Cultural Cognition

- Tendency for people to conform beliefs about controversial matters to group values that define their cultural identities.
Why Facts Alone Don’t Drive Decisions

Confirmation Bias

- Tendency for people to favor information that confirms existing beliefs.
Online Communication is Tribal/Insular

Traditional Communication Model

Expert

Consumer

Consumer

Consumer

Online Friends

Family

Neighbor

Friend

Family

Tribal Communication Model

Online Friends

Family

Blogs
The “Mom” Tribe

What information sources have you used to come to your conclusion that GMOs are dangerous?

Heidi: “I’m part of a moms group. When there is a big consensus, I think ‘there’s something here.’ You don’t need doctors or scientists confirming it when you have hundreds of moms.”
Bad News Bias

• Negative information weighs more heavily on our decisions than positive information.

• A single item of negative information is capable of neutralizing five similar pieces of positive information.
Big is Bad

Shared Values = Trust

Inverse relationship between size and the perception of shared values
The public senses a change in the way food is produced but doesn’t know why

Social media quickly amplifies issues

Online influencers skew information

Media focuses on dramatic stories

Food is necessary, traditional and emotional
The Decision-Making Maze

- Bounded Rationality
- Tribal Communication
- Scientific Illiteracy
- A History of Contradictions
- Confirmation Bias
- Influence of Group Values
- Bad News Bias
- Big Is Bad Bias

Informed Decision Making
Consumer Concerns and Attitudes
Mom, Millennials and Foodies

Just less than half did not fall into one of these three categories.

Moms 30%

Millenials 37%

Foodies 21%

Note: These groups are not mutually exclusive.

Respondents can qualify as more than one (i.e. a Mom who is a Foodie).

Just less than half did not fall into one of these three categories.

N=2005
Millennials . . . . Who are they?

- Currently range in age from 19-34
- Relatively unattached to organized politics and religion
- Linked by social media
- Burdened by debt
- Distrustful of people
- In no rush to marry
- And ... optimistic about the future

Source: The Pew Charitable Trusts
Millennials ... Most Mistrusting ...

**Millennials Less Trusting of Others**

% saying that, generally speaking, most people can be trusted

- **40% Boomer**
- **37% Silent**
- **31% Gen X**
- **19% Millennial**

Question wording: “Generally speaking, would you say that most people can be trusted or that you can’t be too careful in dealing with people?”

Source: General Social Survey data, 1987-2012

Pew Research Center
Moms

Moms 30%

Must have children at home under the age of 18

N=2005
Ages of Moms

- 21-25: 9%
- 26-34: 38%
- 35-44: 29%
- 45-54: 19%
- 55-65: 5%

More likely to sign a petition

N=605
Foodies . . . Who are they?

Foodie:

Person who has an ardent or refined interest in food and alcoholic beverages. A foodie seeks new food experiences as a hobby rather than simply eating out of convenience or hunger.

Source: The American heritage dictionary of the English language. (4th ed.)

N=2005
Ages of Foodies

- 21 to 25: 11%
- 26 to 34: 35%
- 35 to 44: 25%
- 45 to 54: 17%
- 55 to 65: 11%

More likely to sign a petition

N=416
All of the Most Concerning Life Issues are Beyond the Consumer’s Direct Control

Women were more concerned than men about most issues.

Additional Food System Concerns*

- Imported Food Safety (63%)
- Food Safety (62%)
- Enough to Feed U.S. (55%)
- Humane Treatment of Farm Animals (49%)
- Environmental Sustainability in Farming (49%)
- Access to Accurate Info to Make Healthy Food Choices (49%)

Earlier Adopters were more concerned about all issues than later adopters.

33% Lowest concern was for having enough food to feed people outside the U.S.

*Top Box ratings (8-10)
Right Direction/Wrong Track

43% 34%
Right Direction 27% 28%
Unsure

30% 38%
Wrong Track

Early Adopters 36% believe the food system is on the wrong track

48%
Right Direction

32%
Wrong Track
Top Concerns About Issues by Segments

Moms
- Rising Cost of Food (8.71)
- Keeping Healthy Food Affordable (8.65)
- Rising Healthcare Costs (8.51)
- Rising Energy Costs (8.35)
- Food Safety (8.29)

Millennials
- Keeping Healthy Food Affordable (8.18)
- Rising Cost of Food (8.13)
- Rising Healthcare Costs (8.09)

Foodies
- Keeping Healthy Food Affordable (9.27)
- Food Safety (9.18)
- Rising Cost of Food (9.10)
- Rising Healthcare Costs (9.08)
### Right Direction/Wrong Track

<table>
<thead>
<tr>
<th>Right/Wrong</th>
<th>Moms</th>
<th>Millennials</th>
<th>Foodies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Right Direction</td>
<td>36%</td>
<td>41%</td>
<td>49%</td>
</tr>
<tr>
<td>Wrong Track</td>
<td>35%</td>
<td>33%</td>
<td>35%</td>
</tr>
<tr>
<td>Unsure</td>
<td>29%</td>
<td>26%</td>
<td>16%</td>
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</tbody>
</table>
Moms Expressed Concern About Food Issues

Moms’ Most Strongly Held Attitudes Toward Food Issues

1. I believe that the less processed a food is the healthier it is (8.44).

2. I prefer to purchase fruits and vegetables that are in season in my area (8.10).

3. It is important to me that farmers who produce the food I buy receive fair compensation for their work (8.07).

4. I prefer to buy locally produced farm products when they are available (7.92).

5. I like to support farmers in my community by buying their products (7.88).

Numbers are mean scores on a 0-10 agreement scale.
Millennials Expressed Concern About Food Issues

Millennials’ Most Strongly Held Attitudes Toward Food Issues

1. I believe that the less processed a food is the healthier it is (8.12).
2. It is important to me that farmers who produce the food I buy receive fair compensation for their work (7.83).
3. I prefer to purchase fruits and vegetables that are in season in my area (7.66).
4. Organically produced food is grown using fewer chemicals than non-organically produced food (7.66).
5. Animals are treated better on free range farms than animals on farms where they are confined (7.62).

Numbers are mean scores on a 0-10 agreement scale.
Foodies Expressed Concern About Food Issues

Foodies’ Most Strongly Held Attitudes Toward Food Issues

1. I believe that the less processed a food is the healthier it is (9.35).
2. It is important to me that farmers who produce the food I buy receive fair compensation for their work (9.34).
3. I like to support farmers in my community by buying their products (9.30).
4. Organically produced food is better for the environment (9.25).
5. I prefer to buy locally produced farm products when they are available (9.26).

Numbers are mean scores on a 0-10 agreement scale.
Where Consumers go for Information
Consumers Search Online and Watch Local TV for Info on Food System Issues

Ranked First as Info Source on Food System Issues

- Websites: 20% (Highest % of Top Source Mentions for Early Adopters)
- Local TV Station: 16%
- Friends-Not Online: 12%
- Family-Not Online: 12%
- Google: 10%

22% 23%
Top Sources of Information

Moms
Top Sources Ranked #1

- **Websites** (21%)
- Family-Not Online (14%)
- Google (12%)
- Local TV Station (12%)
- Friends-Not Online (11%)
Top Sources of Information

Millennials

Top Sources Ranked #1

- **Websites** (22%)
- Friends-Not Online (16%)
- Google (15%)
- Family-Not Online (13%)
- Friends-Online (8%)

> 45% Online
Top Sources of Information

Foodies
Top Sources Ranked #1

• **Websites** (25%)
• Friends-Not Online (15%)
• Google (12%)
• Family-Not Online (10%)
• Food Specific TV Programs or Networks (9%)
Messages that Promote Trust?
Change Our Approach

Historically

Research proves it’s ok to do this ...

Financially, it’s in our best interest ...

Could we SHIFT?

It sounds like environmental sustainability is important to you ...
# Answering the Wrong Question

<table>
<thead>
<tr>
<th>Ethical Question (Should)</th>
<th>Science Question (Can)</th>
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</thead>
<tbody>
<tr>
<td><img src="image1.png" alt="Protest Against GMOs" /></td>
<td><img src="image2.png" alt="Scientific Experiment" /></td>
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<tr>
<td><img src="image3.png" alt="Protest Sign" /></td>
<td><img src="image4.png" alt="Scientific Research" /></td>
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Why Values Matter

Universal Values

• **Compassion:** “Be kind to animals.”

• **Responsibility:** “Stop killing the bees.”

• **Respect:** “Protect the environment.”

• **Fairness:** “Balance the needs of people, animals and the planet”

• **Truth:** “Be honest with me.”
Think Differently to Connect

- Economic Viability
  - Scientific Verification
    - Ethical Justification
      - Values
        - Feelings
          - Beliefs
          - Education
          - Knowledge
          - Information
Environment

Values: “We drink the same water and breathe the same air as our neighbors. I want to protect the environment for my family, my community and for future generations so they have it as good, or better, than I do.”

Science: We use environmental practices on our farm that are based on research from land grant universities across the country. I also make sure I’m up to date by taking advantage of the latest training and certification programs.

Economics: Because the market prices farmers receive haven’t kept up with inflation, farms are bigger than they were just a few decades ago. Like most farmers, I’ve changed my operation in order to keep my farm profitable and provide for my family.
Best Practices

• Be yourself.
• Think before you engage.
• Find common ground.
• Avoid getting defensive.
• Offer resources.
• Admit when you don’t know.
• Know when to disengage.
Most Impactful Elements for Believability

Fundamental Message Elements

- **Accurate Presentation of Risks**: Present known risks since known risks “trump” unknown risks by accurately communicating safety facts.

- **Openness/Transparency**: Acknowledge both sides of the story, provide level of depth so it does not look like “holding back,” avoid oversimplification.

- **Unifying Message**: Singular, compelling message that touches the deeper drivers of human behavior - values.
“I am more concerned about global warming than I was one year ago.”

Seven Year Mean

2014 Mean 5.98
2013 Mean 5.73

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Bias Against Size/Scale
“Family farms are likely to put their interests ahead of my interests.”

- 2014:
  - 0 to 3: 17%
  - 4 to 7: 53%
  - 8 to 10: 30%
  - Mean: 5.98

- 2013:
  - 0 to 3: 22%
  - 4 to 7: 52%
  - 8 to 10: 27%
  - Mean: 5.67

Three Year Mean:

- 2012: 5.60
- 2013: 5.67
- 2014: 5.98

Three Year Mean: 5.73
“Commercial farms are likely to put their interests ahead of my interests.”

<table>
<thead>
<tr>
<th>Year</th>
<th>0 to 3</th>
<th>4 to 7</th>
<th>8 to 10</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>6%</td>
<td>45%</td>
<td>49%</td>
</tr>
<tr>
<td>2014</td>
<td>6%</td>
<td>45%</td>
<td>50%</td>
</tr>
</tbody>
</table>

Three Year Mean

- 2012: 7.20
- 2013: 7.20
- 2014: 7.19

2014 Mean 7.19
2013 Mean 7.20
“Small farms are likely to put their interests ahead of my interests.”

2014
- 0 to 3: 16%
- 4 to 7: 53%
- 8 to 10: 31%

2013
- 0 to 3: 19%
- 4 to 7: 53%
- 8 to 10: 28%

2014 Mean 5.99
2013 Mean 5.75

Two Year Mean
“Large farms are likely to put their interests ahead of my interests.”

2013 Mean 7.10
2014 Mean 7.04

Year | 0 to 3 | 4 to 7 | 8 to 10 | Total
--- | --- | --- | --- | ---
2014 | 6% | 47% | 47% | 100%
2013 | 7% | 45% | 48% | 100%
“Small food companies are likely to put their interests ahead of my interests.”

- **2013**
  - 0 to 3: 15%
  - 4 to 7: 55%
  - 8 to 10: 31%

- **2014**
  - 0 to 3: 13%
  - 4 to 7: 55%
  - 8 to 10: 32%

2013 Mean: 6.06
2014 Mean: 6.20
“Large food companies are likely to put their interests ahead of my interests.”

2014 Mean 7.42
2013 Mean 7.38

Two Year Mean
“Local food companies are likely to put their interests ahead of my interests.”

![Bar chart showing percentage distribution in 2013 and 2014.]

- **2013**
  - 0 to 3: 13%
  - 4 to 7: 55%
  - 8 to 10: 32%

- **2014**
  - 0 to 3: 13%
  - 4 to 7: 51%
  - 8 to 10: 36%

**Two Year Mean**

- **2013 Mean**: 6.20
- **2014 Mean**: 6.35

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“National food companies are likely to put their interests ahead of mine.”

<table>
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<th>0 to 3</th>
<th>4 to 7</th>
<th>8 to 10</th>
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<tbody>
<tr>
<td>2013</td>
<td>6%</td>
<td>43%</td>
<td>52%</td>
</tr>
<tr>
<td>2014</td>
<td>5%</td>
<td>45%</td>
<td>49%</td>
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2014 Mean 7.26
2013 Mean 7.27

Two Year Mean

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"I trust today’s food system."

2014

0% 20% 40% 60% 80% 100%

17% 55% 28%

2014 Mean 5.84
Discouraged yet? Don’t be!

Don’t assume they are trying to “get you”.

No food production practice or commodity is immune.

Don’t start with science, economic impact or best practices.

Lead with a common values statement.

Forget WINNING!

It takes time to change perceptions – think orchard or vineyard – not corn and soybeans.
Research Summary

Summary report available at: www.foodintegrity.org

For more information about communicating with consumers go to www.bestfoodfacts.org www.cfiengage.com
Questions and Discussion

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