Building consumer trust and confidence in today’s food system

2010 California Consumer Research

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Earning and Maintaining the Social License
(Sapp/CMA)

Confidence

Trust

Social License

Freedom to Operate

Trust research was published in December, 2009 – *Journal of Rural Sociology*
What Drives Consumer Trust?

Shared values are 3-5X more important in building trust than demonstrating competence.

Trust research was published in December, 2009 – Journal of Rural Sociology
Balancing for Success

Sustainable Systems

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

**Scientifically Verified**
- Data Driven
- Repeatable
- Measurable
- Specific
- Objectivity

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

**Knowledge**

**Feelings**

**Belief**

**Profitability**
“They don’t care how much you know until they know how much you care”

- Theodore Roosevelt
Thank You

2010 Consumer Trust Research Sponsors
Quantitative Research
California

Summary of Findings
## Summary of Concerns About Issues (Randomized)

<table>
<thead>
<tr>
<th>Issue</th>
<th>US</th>
<th>CA</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. The U.S. Economy</td>
<td>8.07</td>
<td>7.88</td>
</tr>
<tr>
<td>2. Rising Health Care Costs</td>
<td>7.98</td>
<td>7.57</td>
</tr>
<tr>
<td>3. Unemployment in the U.S.</td>
<td>7.94</td>
<td>7.95</td>
</tr>
<tr>
<td>4. Rising Energy Costs</td>
<td>7.76</td>
<td>7.45</td>
</tr>
<tr>
<td>5. Personal Financial Situation</td>
<td>7.71</td>
<td>7.55</td>
</tr>
<tr>
<td>6. Rising Cost of Food</td>
<td>7.70</td>
<td>7.42</td>
</tr>
<tr>
<td>7. Food Safety</td>
<td>7.37</td>
<td>7.32</td>
</tr>
<tr>
<td>8. Safety of Food Imported from Outside the U.S.</td>
<td>7.36</td>
<td>7.16</td>
</tr>
<tr>
<td>9. Impact of Oil Spill in the Gulf</td>
<td>7.23</td>
<td>6.60</td>
</tr>
<tr>
<td>10. Global Economy</td>
<td>7.08</td>
<td>6.92</td>
</tr>
</tbody>
</table>
## Summary of Concerns About Issues (cont’d)

<table>
<thead>
<tr>
<th>Issue</th>
<th>US</th>
<th>CA</th>
</tr>
</thead>
<tbody>
<tr>
<td>11. U.S. Military Involvement in Iraq/Afghanistan</td>
<td>7.02</td>
<td>6.58</td>
</tr>
<tr>
<td>12. Having Enough Food to Feed People in U.S.</td>
<td>6.92</td>
<td>6.55</td>
</tr>
<tr>
<td>13. Humane Treatment of Farm Animals</td>
<td>6.52</td>
<td>6.30</td>
</tr>
<tr>
<td>15. Obesity in America</td>
<td>6.38</td>
<td>6.27</td>
</tr>
<tr>
<td>16. Global Warming</td>
<td>6.00</td>
<td>5.80</td>
</tr>
<tr>
<td>17. Having Enough Food to Feed People in Developing Countries</td>
<td>5.59</td>
<td>5.57</td>
</tr>
</tbody>
</table>
Building Humane Treatment of Farm Animals Trust
Innovator Classification Along Humane Treatment of Animals Issues

<table>
<thead>
<tr>
<th>Segments</th>
<th>US</th>
<th>CA</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Base)</td>
<td>(2002)</td>
<td>(202)</td>
</tr>
<tr>
<td>I’m quick to form opinions on humane treatment of farm animals issues and rarely rely on others for input (Innovator)</td>
<td>16.2%</td>
<td>16.3%</td>
</tr>
<tr>
<td>I actively seek information on humane treatment of farm animals issues so I can weigh the issues and have informed opinions (Early Adopter)</td>
<td>25.1%</td>
<td>18.8%</td>
</tr>
<tr>
<td>I usually make up my mind about humane treatment of farm animals issues after others have debated the issues at length (Early Majority)</td>
<td>18.5%</td>
<td>23.8%</td>
</tr>
<tr>
<td>I don’t really think about humane treatment of farm animals issues unless I happen to hear something on the radio or see something on TV (Late Majority)</td>
<td>30.9%</td>
<td>31.2%</td>
</tr>
<tr>
<td>I only think about humane treatment of farm animals issues if I’m forced to (Laggard)</td>
<td>9.2%</td>
<td>9.9%</td>
</tr>
</tbody>
</table>

- Nineteen percent chose the category which classified them as Early Adopters along Humane Treatment of Farm Animals.
Farm Animal Welfare
Attitudinal Tracking Data
“If farm animals are treated decently and humanely, I have no problem consuming meat, milk and eggs.”
“U.S. meat is derived from humanely treated animals.”

<table>
<thead>
<tr>
<th>Year</th>
<th>0 to 3</th>
<th>4 to 7</th>
<th>8 to 10</th>
<th>2010 Mean</th>
<th>2010 CA Mean</th>
<th>2009 Mean</th>
<th>2009 CA Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>17%</td>
<td>53%</td>
<td>30%</td>
<td>5.89</td>
<td>5.56</td>
<td>5.50</td>
<td>5.27</td>
</tr>
<tr>
<td>2010 CA</td>
<td>22%</td>
<td>49%</td>
<td>29%</td>
<td>5.56</td>
<td>5.02</td>
<td>5.56</td>
<td>5.30</td>
</tr>
<tr>
<td>2009</td>
<td>21%</td>
<td>53%</td>
<td>27%</td>
<td>5.27</td>
<td>4.88</td>
<td>5.02</td>
<td>4.80</td>
</tr>
<tr>
<td>2009 CA</td>
<td>22%</td>
<td>57%</td>
<td>21%</td>
<td>5.30</td>
<td>4.80</td>
<td>5.27</td>
<td>4.80</td>
</tr>
</tbody>
</table>

Four Year Mean

- US: 5.02, 4.88, 5.50, 5.89
- CA: 4.80, 4.80, 5.27, 5.02

Graph showing the percentage distribution of meat quality categories from 2007 to 2010 for both US and CA.
Coalition for Sustainable Egg Supply
Coalition for Sustainable Egg Supply

• Comprised of leading animal welfare scientists, research institutions, non-governmental organizations, egg suppliers, food manufacturers, restaurant/foodservice and food retail companies.

• The CSES believes a sustainable supply of eggs requires a balanced evaluation of:
  – Food safety
  – Worker health and safety
  – Hen health and well-being
  – Environmental impact
  – Food affordability
Coalition for Sustainable Egg Supply

• The CSES leadership team includes:
  – Research – Michigan State University and University of California, Davis
  – Egg Supplier – Cargill Kitchen Solutions, Inc.
  – Food Retailer – McDonald’s USA, LLC
  – Animal Well-Being – American Humane Association
  – Facilitator – Center for Food Integrity

• Member advisors include:
  – American Veterinary Medical Association
  – USDA Agricultural Research Service
  – Environmental Defense Fund (non-member advisor)
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