



THE CENTER FOR
FOOD INTEGRITY

Cracking the Code on Food Issues

Insights into Moms, Foodies
and Millennials

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Center for Food Integrity

- **Mission:** To build consumer trust and confidence in today's food.
- **Vision:** Facilitate dialogue with consumers and the food system to create better alignment with consumer expectations.



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The Center for Food Integrity

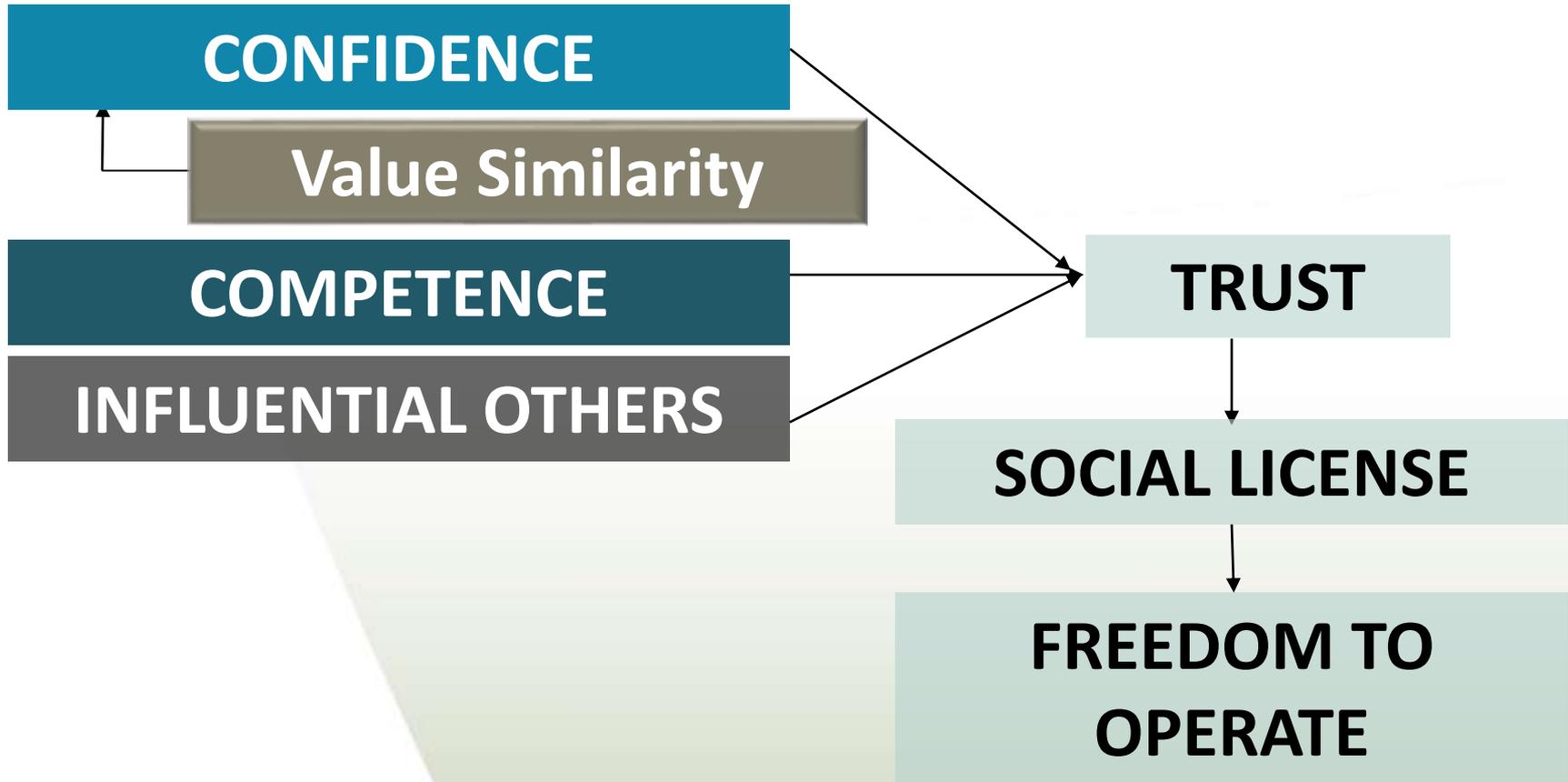
Members and Project Supporters:

- State & National Commodity Associations
- Universities
- Food Companies
- Restaurants
- Retail Grocers
- Non-Governmental Organizations
- Technology Companies
- Animal Health Companies
- Cooperatives
- Financial Companies



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The CFI Trust Model (Sapp/CMA)

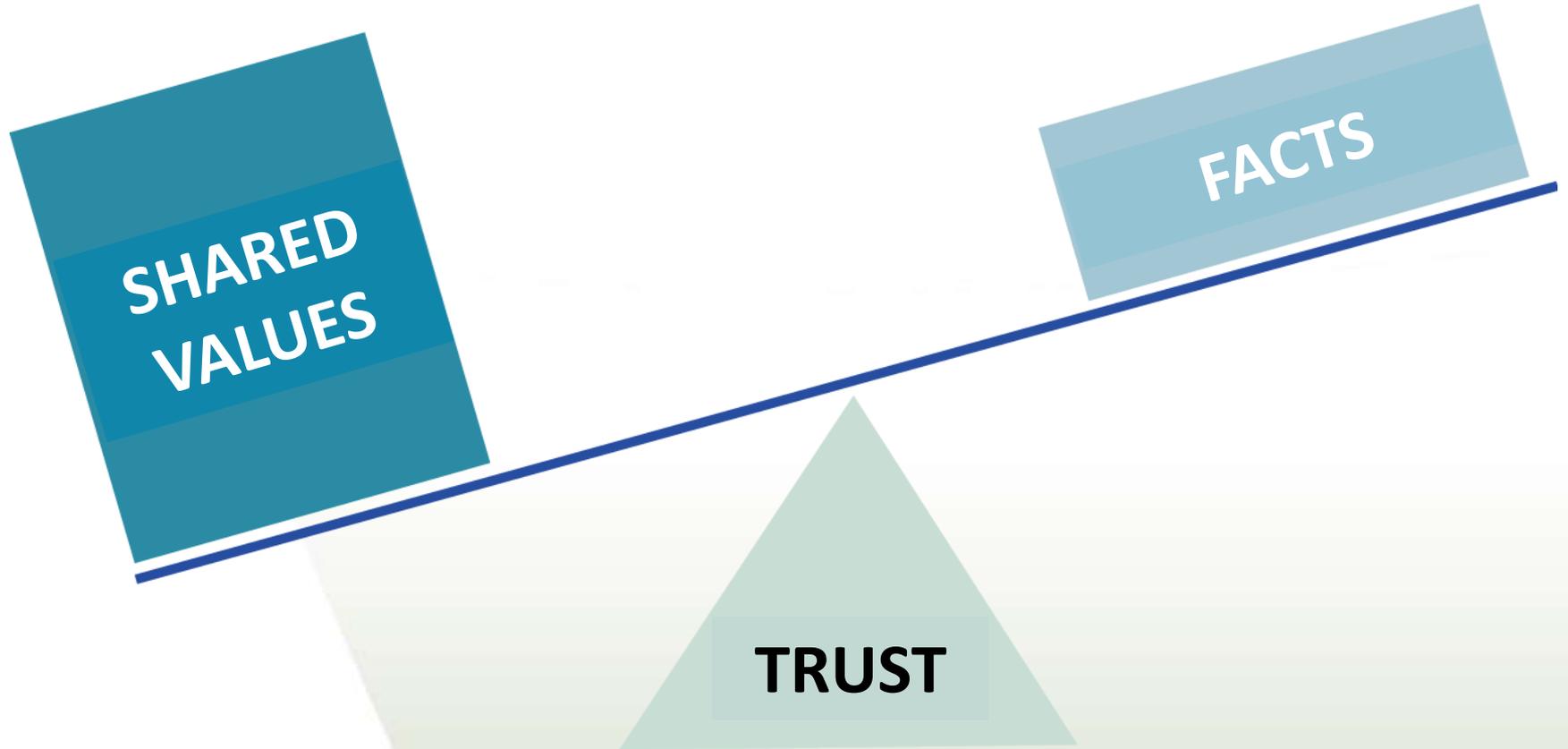


Trust research was published in the
December 2009 *Journal of Rural Sociology*



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What Drives Trust?



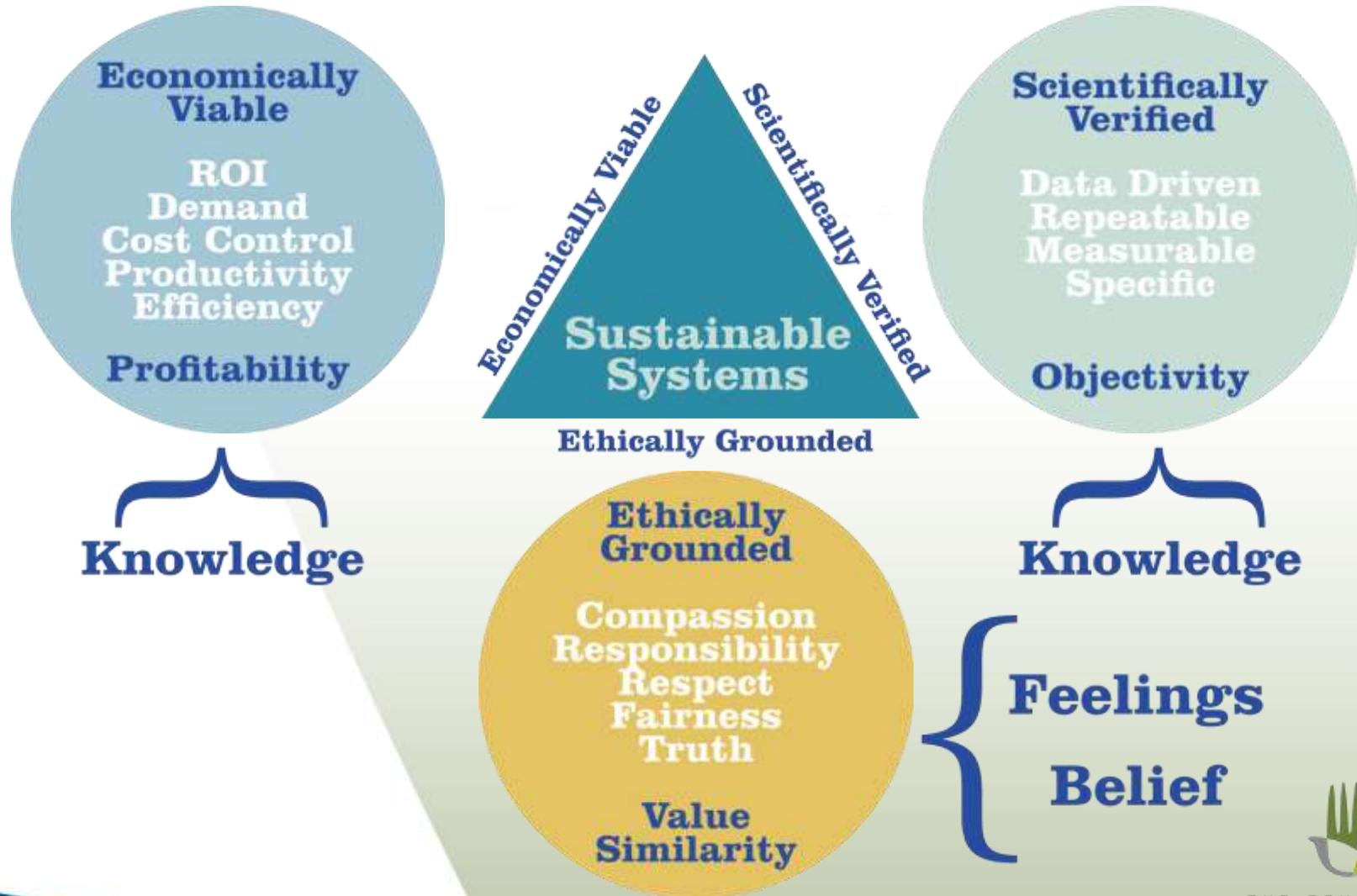
***FACTS* are 3-5x less important than *VALUES* in building trust**

Trust research was published in the December 2009 *Journal of Rural Sociology*



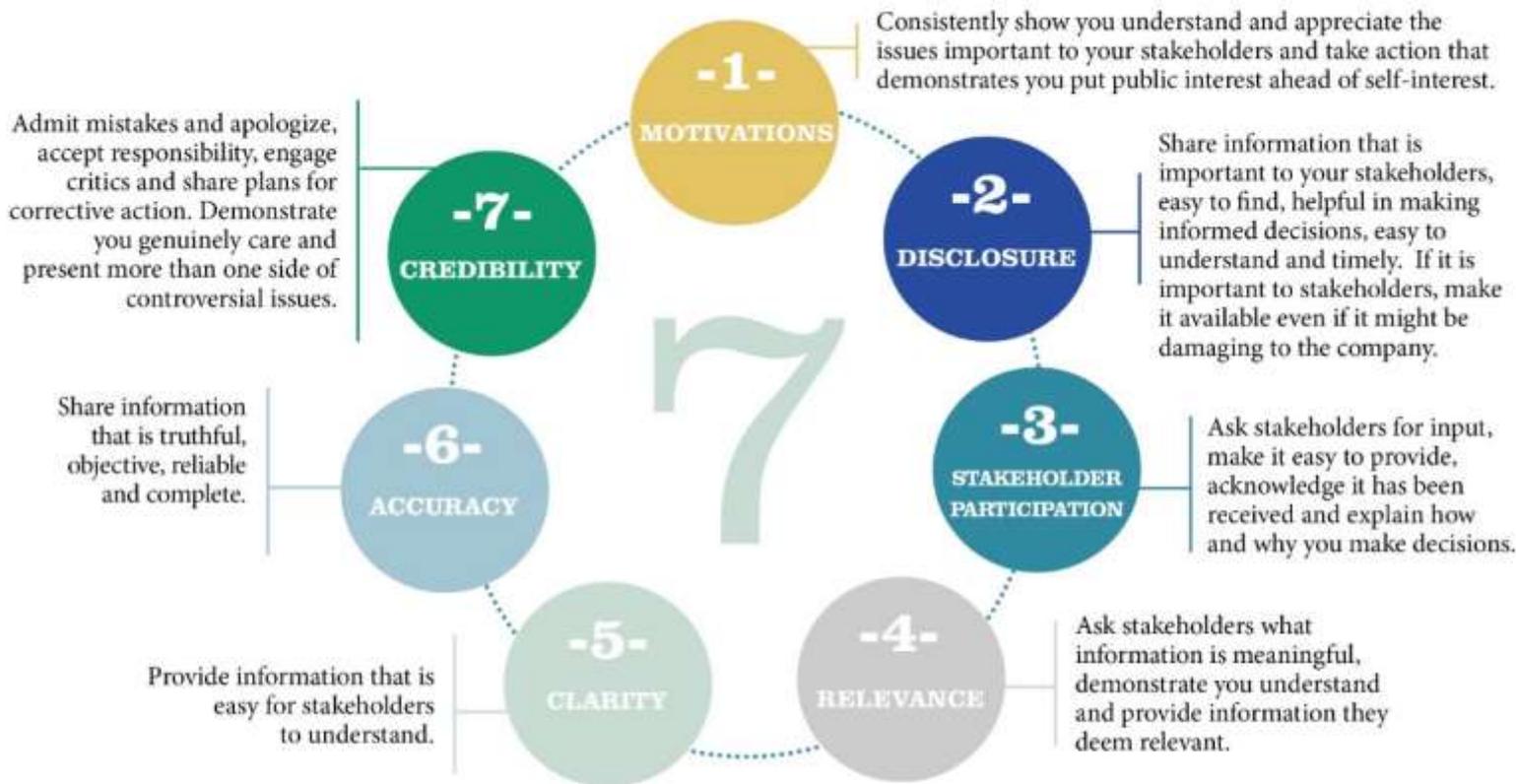
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Sustainable Balance





Elements of Trust-Building Transparency



33



Measured **33 different attributes** across **seven elements** that contribute to Trust-Building Transparency



Half or more gave top box ratings of (8-10) on most statements across elements of transparency



Women generally rated all attributes **higher** than men in contributing to trust

Early Adopters generally rated all attributes **higher** than later adopters in contributing to trust



The model provides a roadmap for transparency that builds trust



CRACKING THE CODE ON FOOD ISSUES:
Insights from Moms, Millennials and Foodies
THE CENTER FOR FOOD INTEGRITY 2014 CONSUMER TRUST RESEARCH

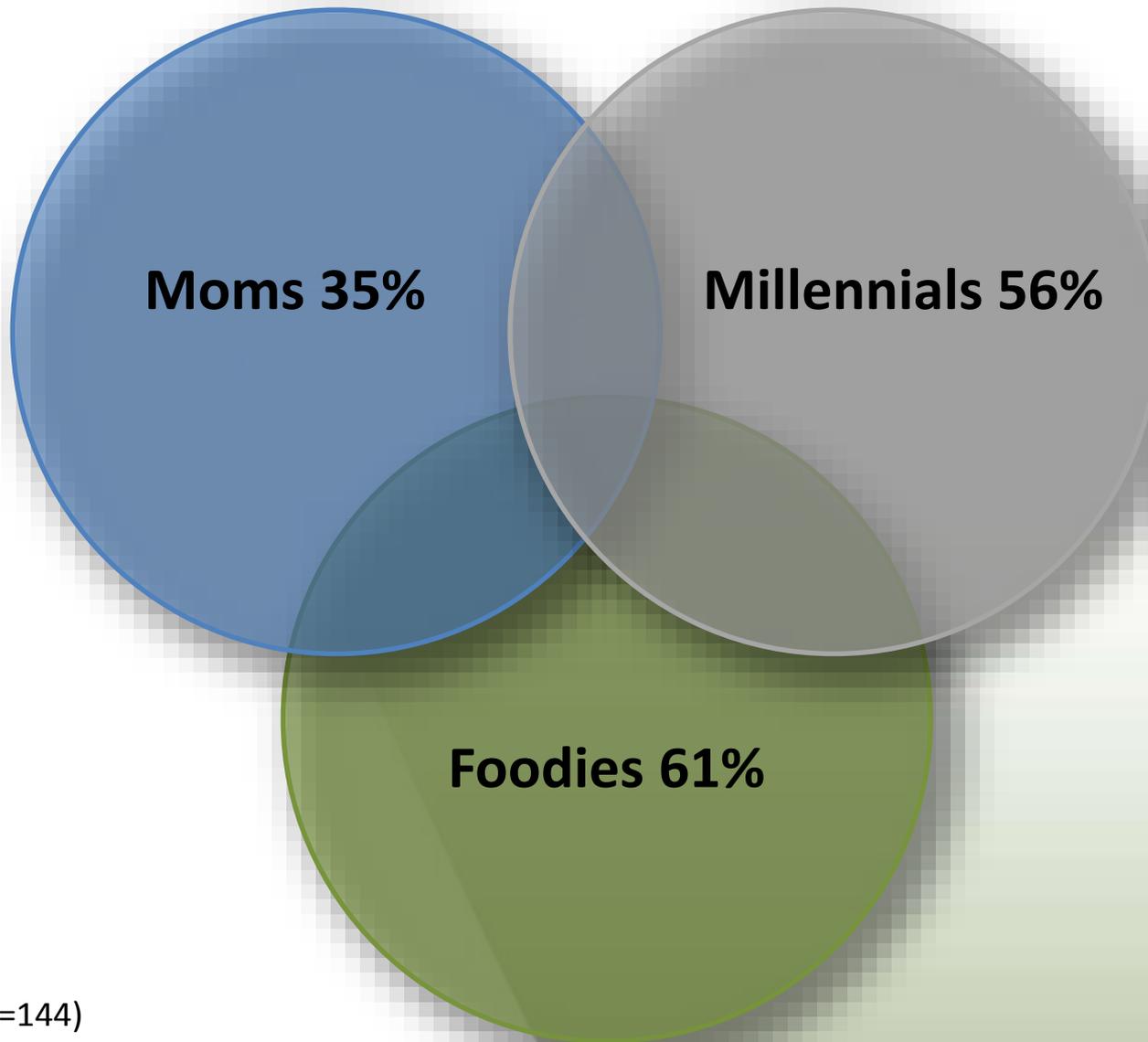
Cracking the Code on Food Issues

Insights from 2014 Consumer Trust Study



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Moms, Millennials and Foodies



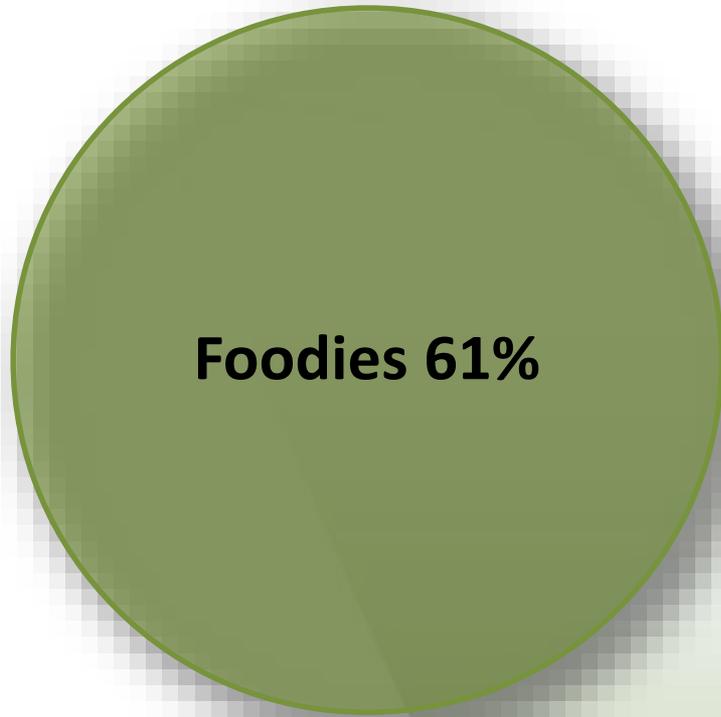
Note: These groups are not mutually exclusive. Respondents can qualify as more than one category (i.e. a mom who is a foodie).

(n=144)



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FoodiesWho 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=144



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Foodie Behaviors (What They Do)



General Population

Seek out info on ingredients used in food eaten (6.70) ◀

Share info about cooking (6.41) ◀

Share nutrition info (6.16) ◀

Share info on food safety (6.00) ◀

Foodies

▶ Seek out info on ingredients used in food eaten (9.13)

▶ Share info about food safety (9.02)

▶ Share info about cooking (9.00)

▶ Share nutrition info (8.94)

To be classified a Foodie, respondents had to rate their agreement as 8 or higher on a series of 29 questions related to attitude and behavior.

Numbers are mean scores on the 0 to 10 agreement scale.



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Right Direction/Wrong Track

42% CA: 44%

Right Direction

28% CA: 24%

Unsure

30% CA: 32%

Wrong Track

Early Adopters:
36%
believe the food
system is on the
wrong track.
CA: 40%



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Right Direction/Wrong Track

CA Totals

Right: 44%

Wrong: 32%

Unsure: 24%



	Moms	Millennials	Foodies
Right Direction	<u>36%</u> CA: 29%	<u>41%</u> CA: 37%	<u>49%</u> CA: 51%
Wrong Track	<u>35%</u> CA: 45%	<u>33%</u> CA: 38%	<u>35%</u> CA: 34%
Unsure	<u>29%</u> CA: 26%	<u>26%</u> CA: 25%	<u>16%</u> CA: 15%



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California Consumer Concerns About Life and Current Events

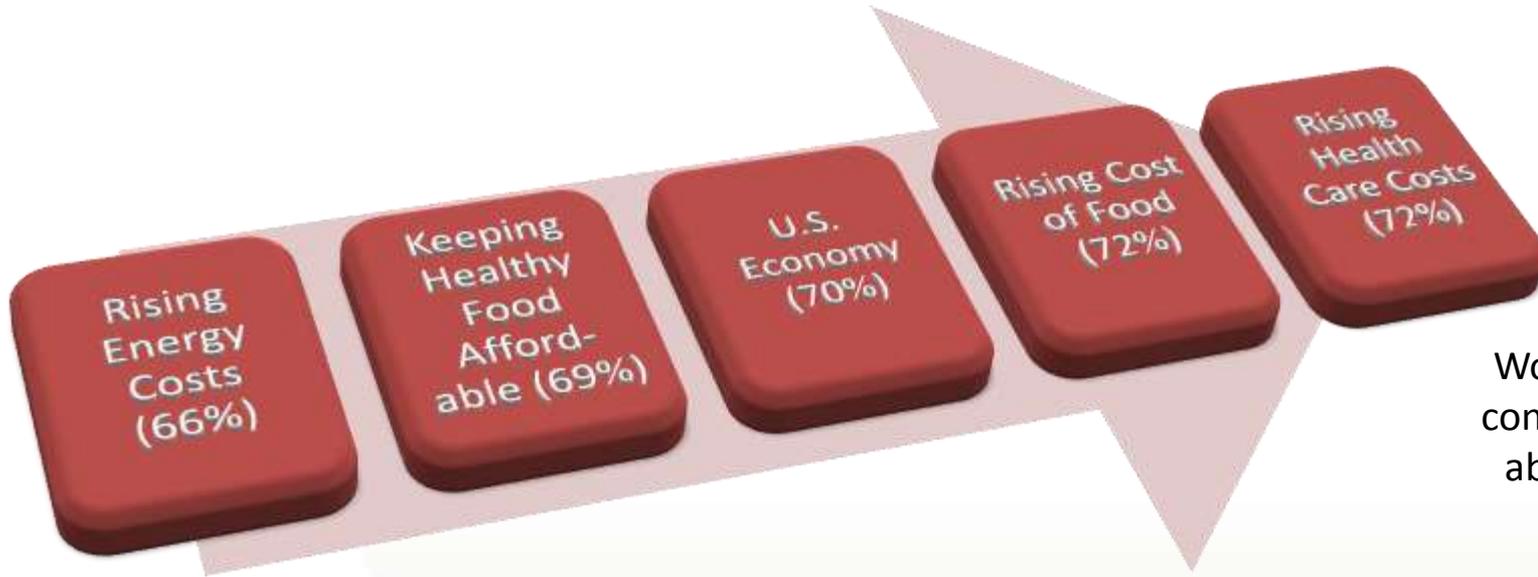


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All of the Most Concerning Life Issues are Beyond the Consumer's Direct Control (18 Issues)



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%)
- Lowest: Having enough food to feed people outside the U.S. (33%)

Early Adopters

Earlier Adopters were more concerned about all issues than later adopters



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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)

U.S. Economy (8.28)



Millennials

Keeping Healthy Food Affordable (8.18)

Rising Cost of Food (8.13)

Rising Healthcare Costs (8.09)

U.S. Economy (8.01)



Foodies

Keeping Healthy Food Affordable (9.27)

Food Safety (9.18)

Rising Cost of Food (9.10)

Rising Healthcare Costs (9.08)

U.S. Economy (9.08)



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Top Concerns About Issues by Segment: CA



Moms

Rising Cost of Food (8.94)

Rising Health Care Costs (8.57)

Rising Energy Costs (8.55)

Food Safety (8.55)

U.S. Economy (8.53)

Keeping Healthy Food Affordable (8.51)



Millennials

Rising Health Care Costs (8.25)

Keeping Healthy Food Affordable (8.10)

Rising Cost of Food (8.10)

Personal Financial Situation (8.06)



Foodies

Food Safety (9.43)

Safety of Imported Food (9.11)

Rising Health Care Costs (9.06)

Access to Accurate Info to Make Healthy Food Choices (9.04)

U.S. Economy (9.02)

Keeping Healthy Food Affordable (9.00)

Not at top of concerns list:

Global warming/climate change

Environmental sustainability in farming



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Tracking Attitudes Toward the U.S. Food Supply Over Time: California



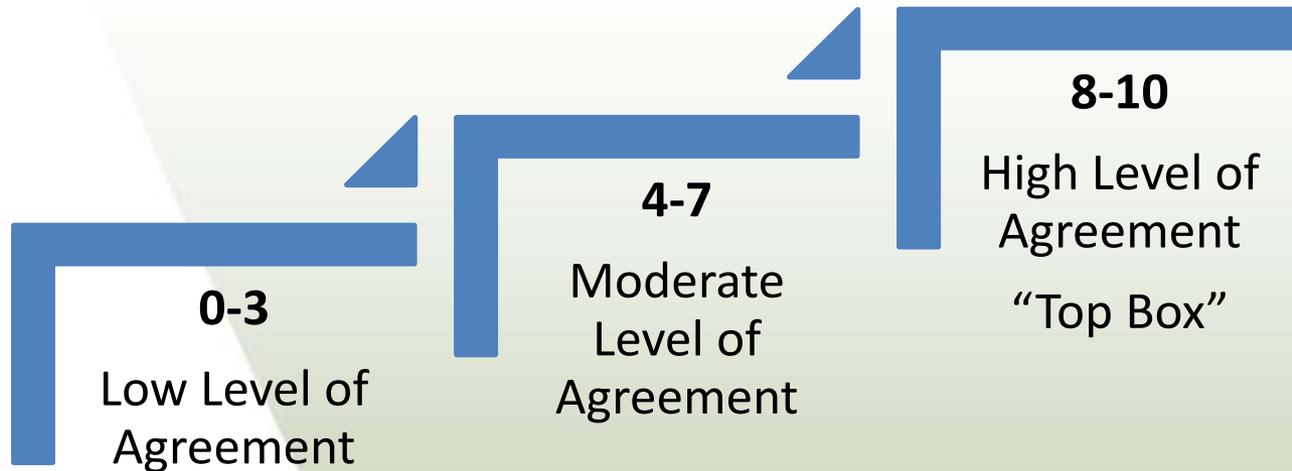
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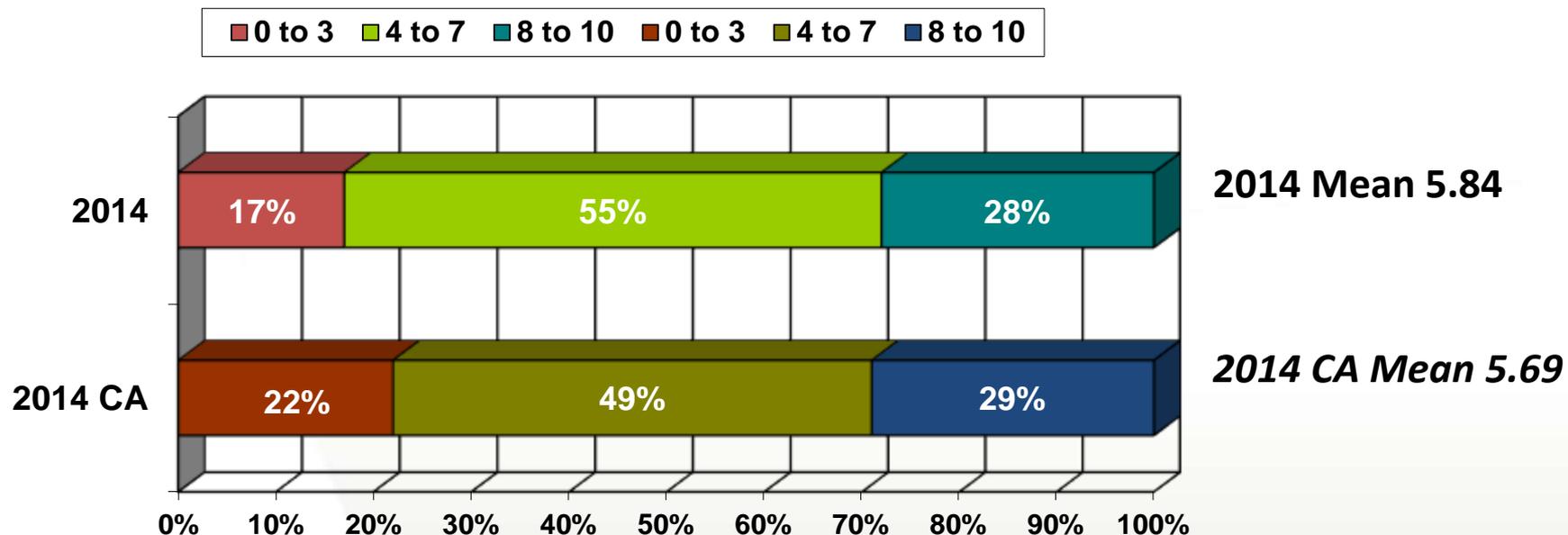
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Attitudes Toward the Food Supply

- Consumers rated their agreement with several additional statements regarding the food supply.
- Used a 0 to 10 scale where “0” meant they strongly disagreed and “10” meant they strongly agreed with the statement:



“I trust today’s food system.”



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Sustainability

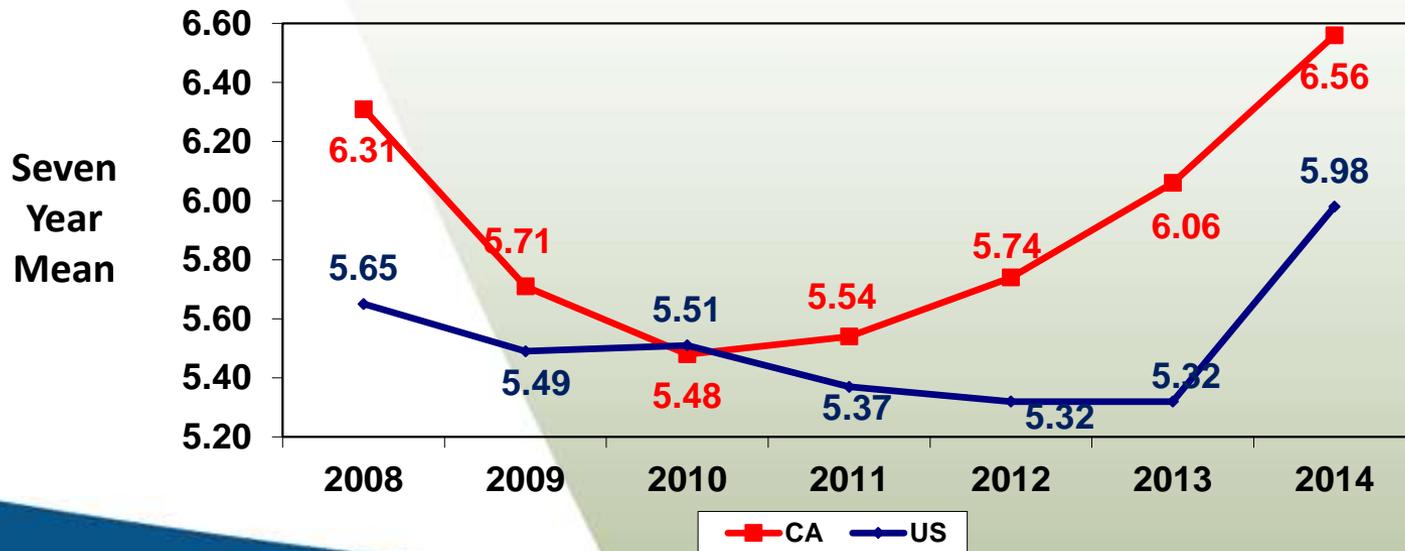
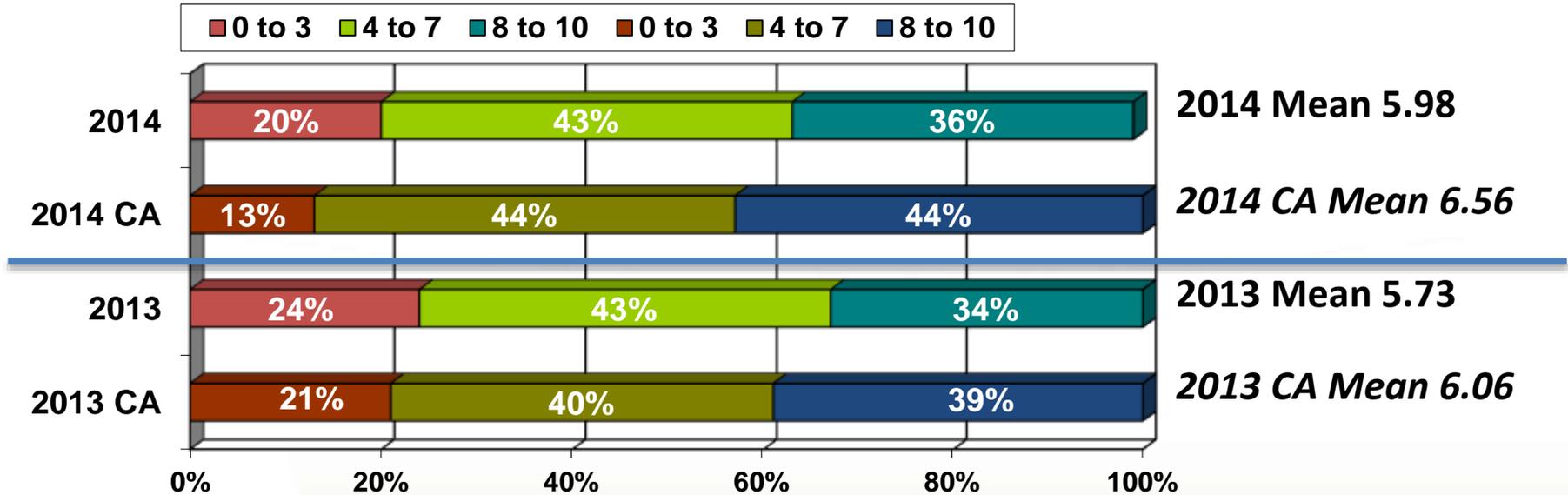


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“I’m more concerned about global warming than I was a year ago.”



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Feeding the World

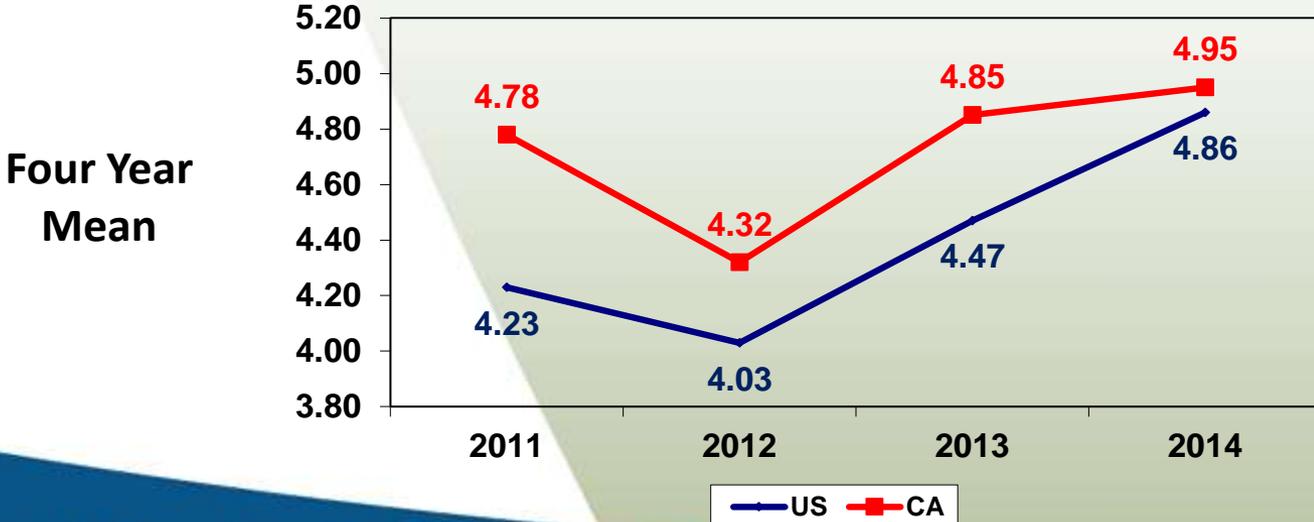
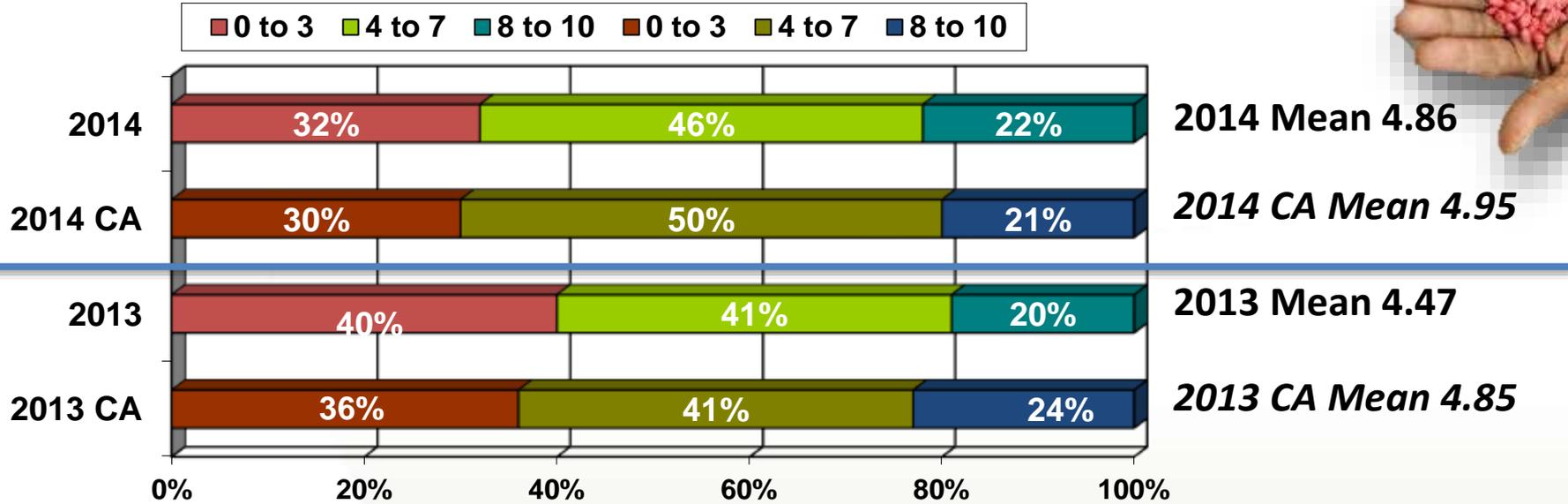


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“The U.S. has a responsibility to provide food for the rest of the world”



Economics

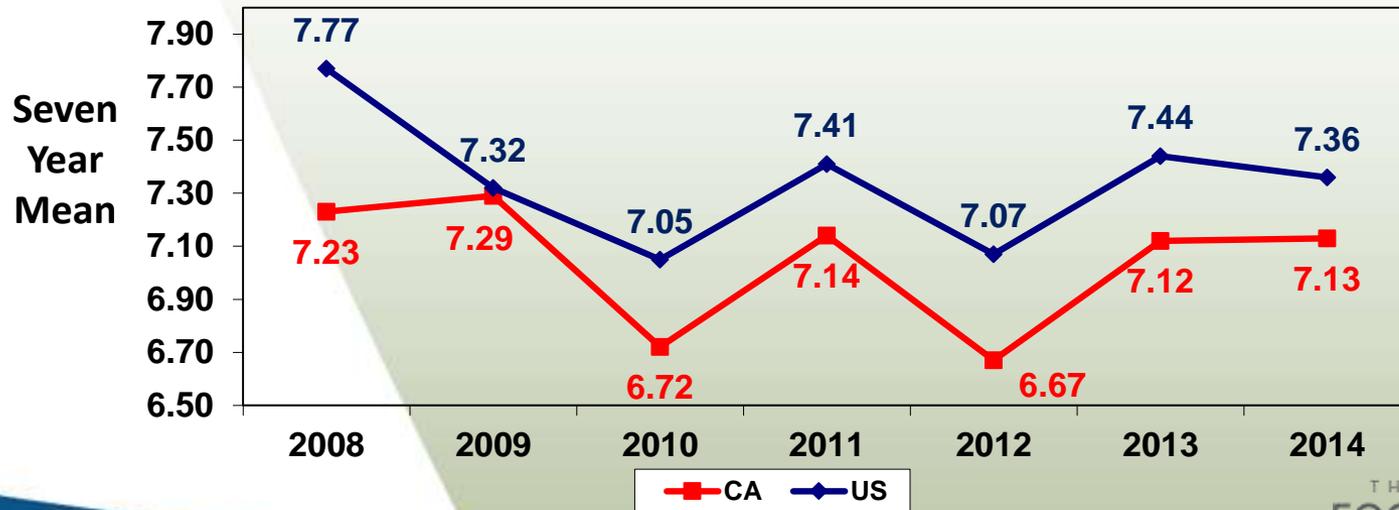
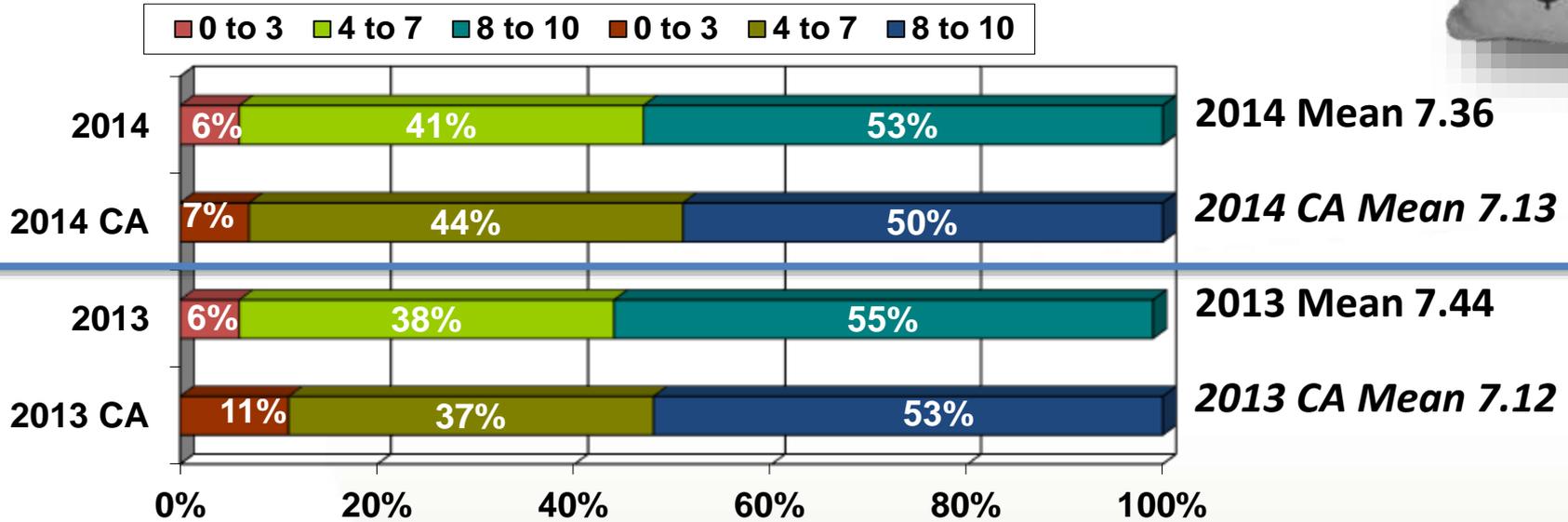


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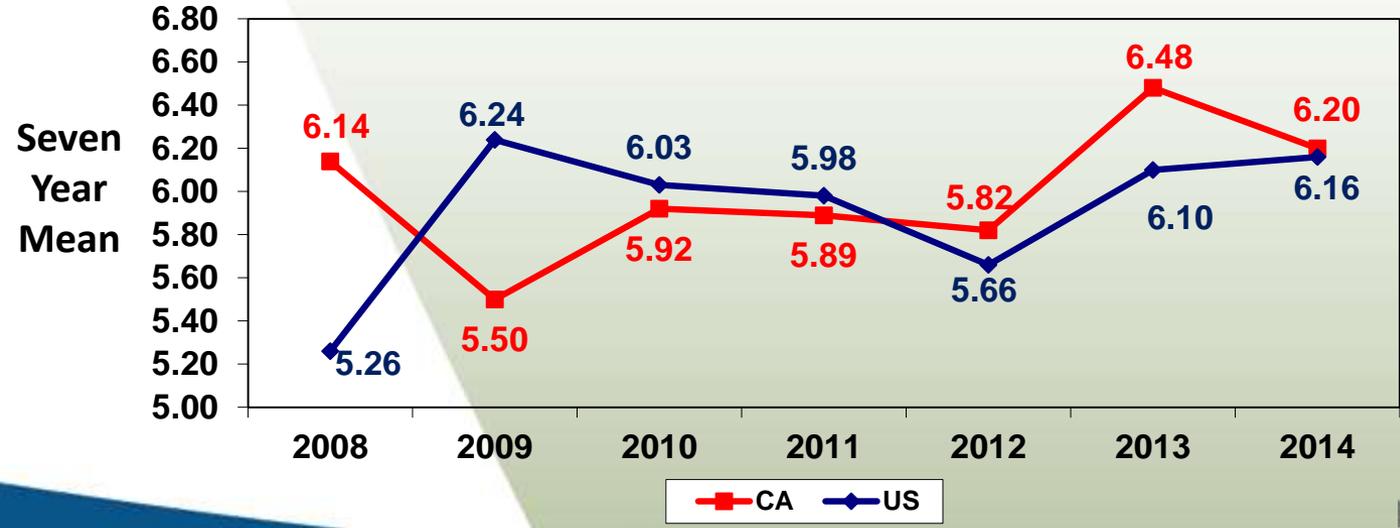
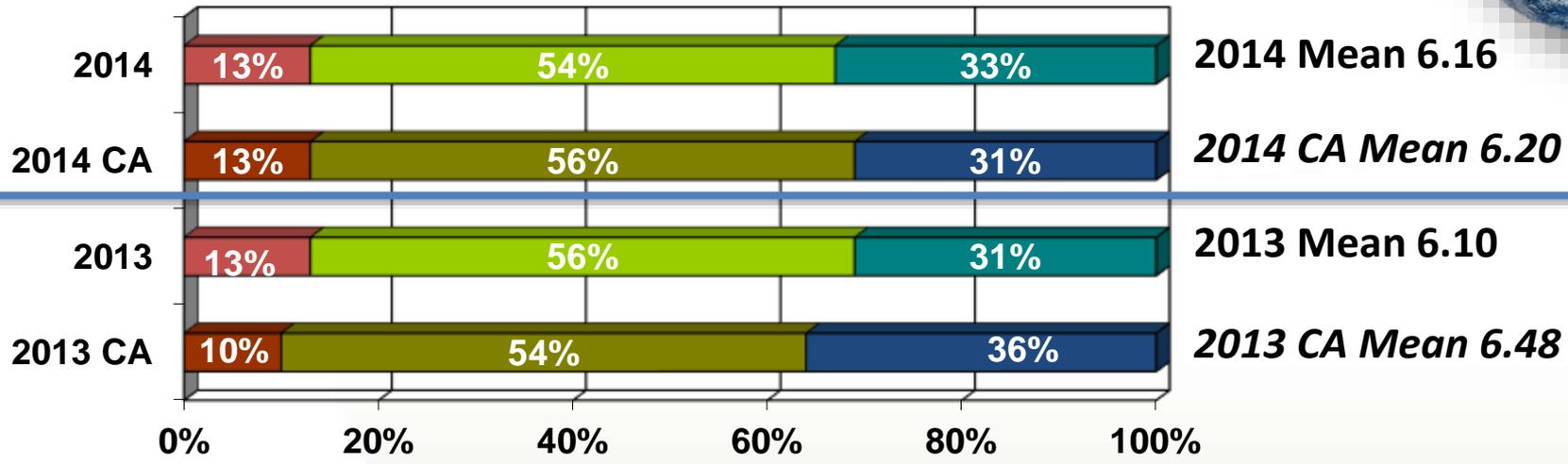
“Food prices are a greater concern to me now than they were a year ago.”



“U.S. food is amongst the most affordable in the world today.”



■ 0 to 3
 ■ 4 to 7
 ■ 8 to 10
 ■ 0 to 3
 ■ 4 to 7
 ■ 8 to 10



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Farm Animal Welfare

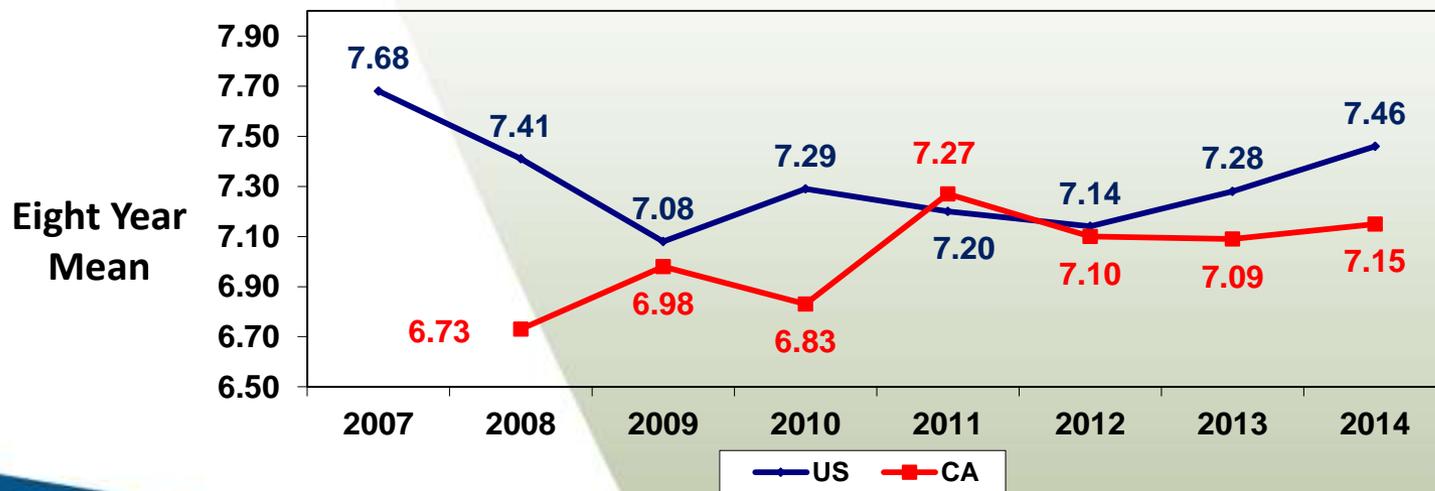
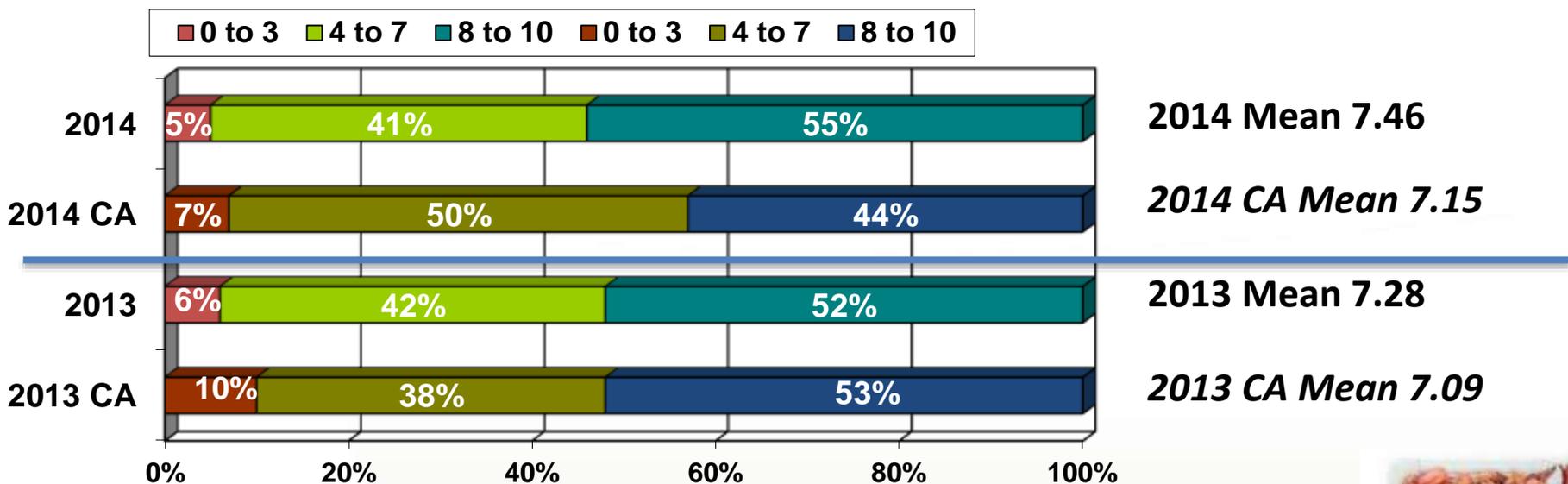


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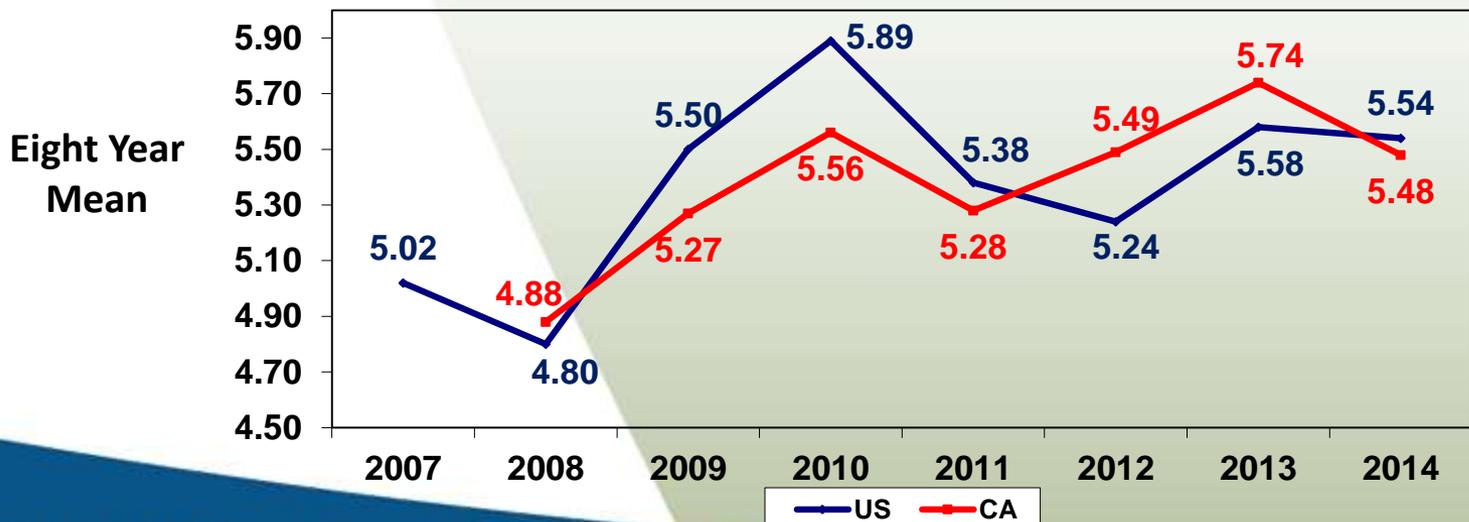
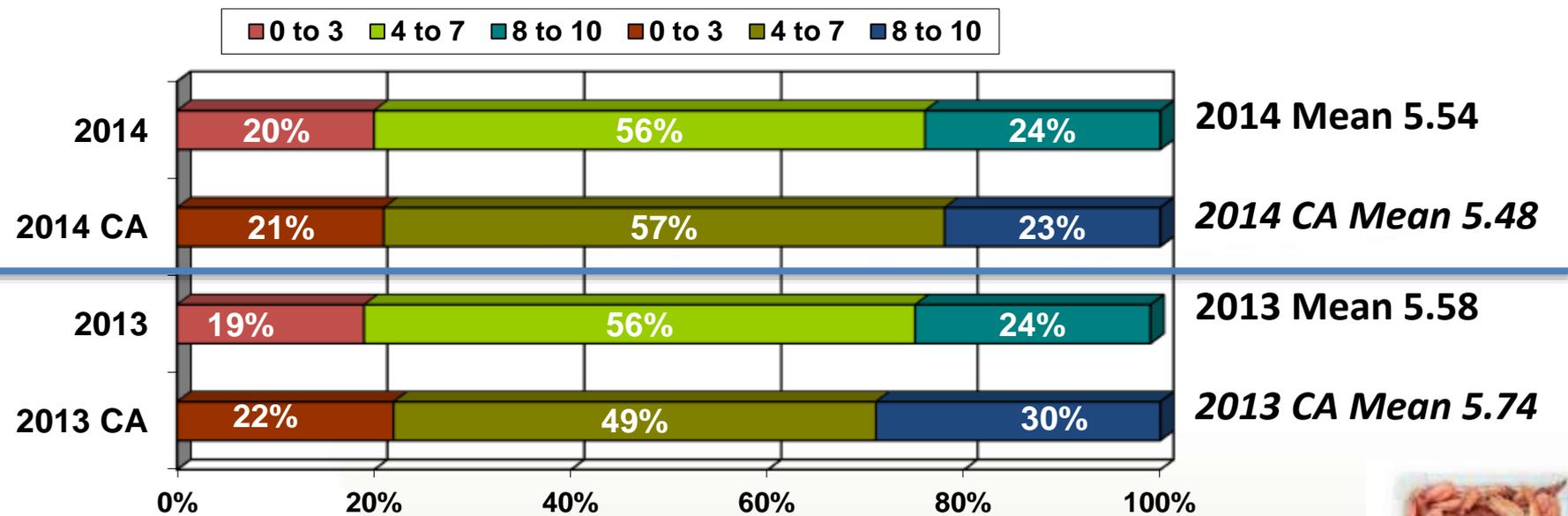
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“If farm animals are treated decently and humanely, I have no problem consuming meat, milk and eggs”



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“U.S. meat is derived from humanely treated animals”

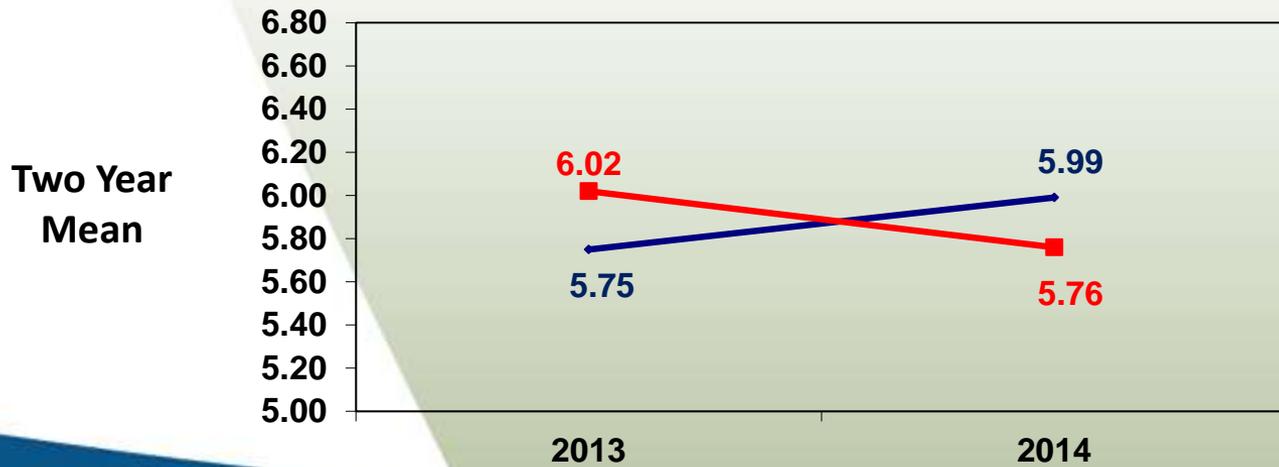
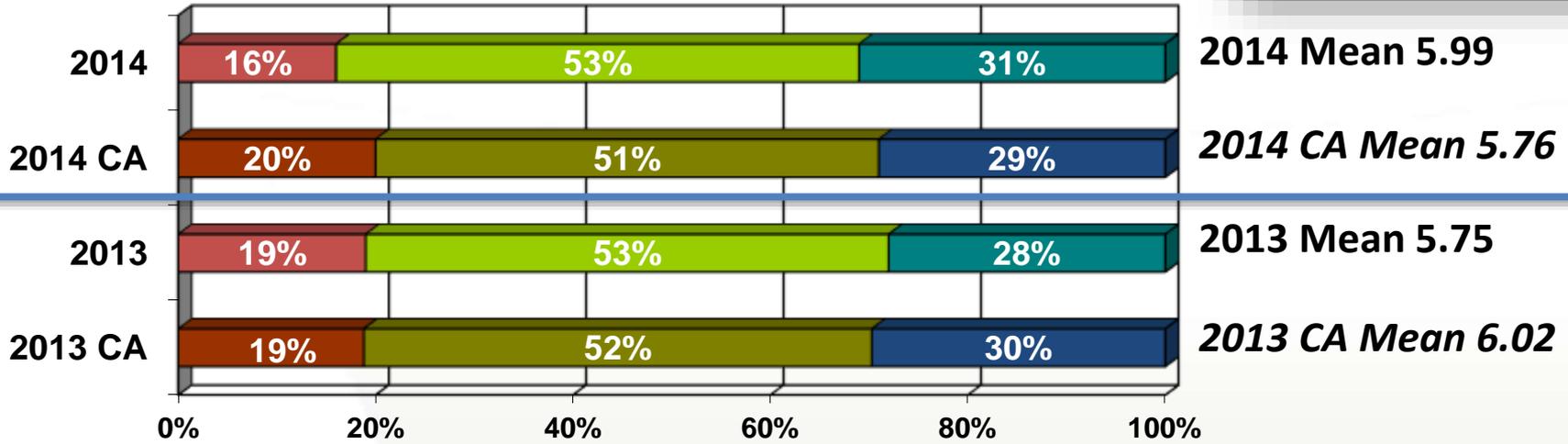


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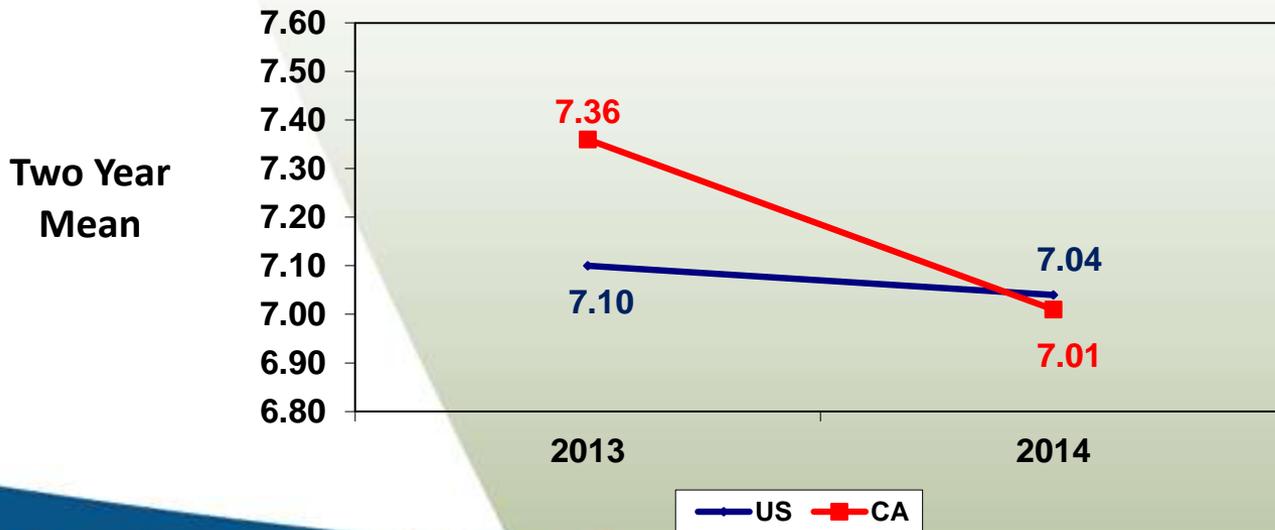
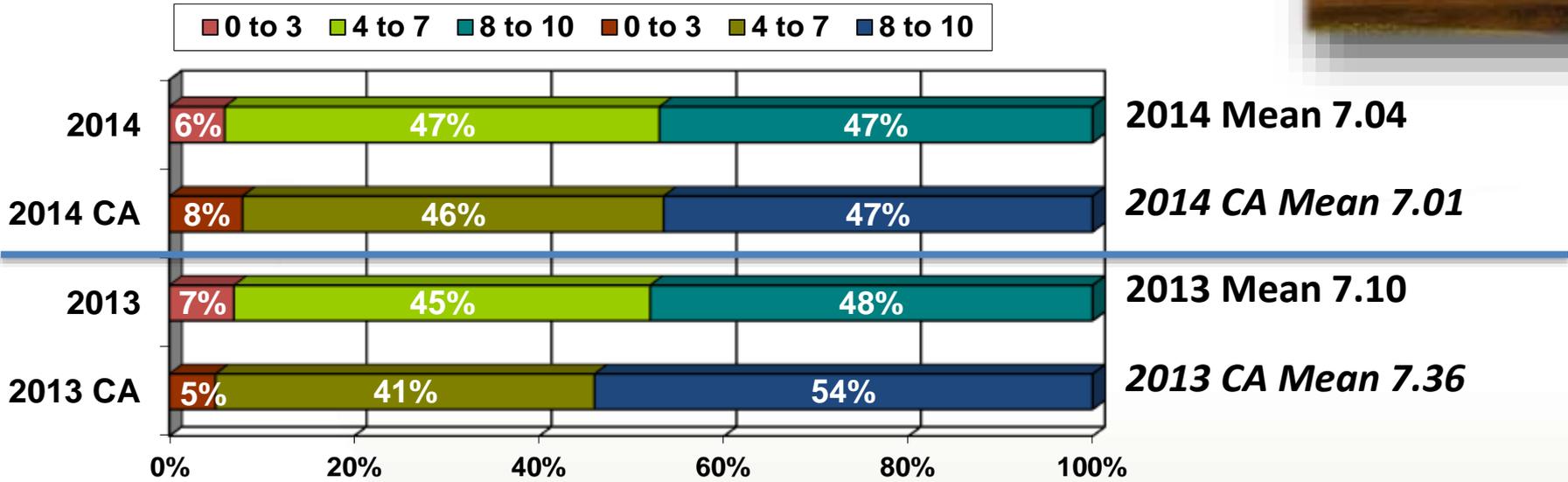
“Small farms are likely to put their interests ahead of my interests.”



■ 0 to 3
 ■ 4 to 7
 ■ 8 to 10
 ■ 0 to 3
 ■ 4 to 7
 ■ 8 to 10



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



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Where Consumers Go for Information



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Californians Go Online For Food System Issues

Ranked First as Info Source
on Food System Issues



Web
Sites 21%

(Highest % of
Top Source
Mentions for
Early
Adopters)



Family-
Not
Online
13%



Google
13%



Local TV
Station
11%



Friends-
Not
Online
11%



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Websites are Top Source of Information on Food System Issues



Moms

Websites (34%)

Family-Not Online
(16%)

Local TV Station
(12%)



Millenials

Websites (31%)

Family-Not Online
(20%)

Friends-Not Online
(16%)



Foodies

Websites (45%)

Friends-Not Online
(17%)

**Food Specific TV
Programs or
Networks** (11%)



Early Adopters

Websites (40%)

Family-Not Online
(12%)

**Food Specific TV
Programs or
Networks** (9%)



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2014 Research



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When Science and Consumers Collide

How do we connect?

- 2014 CFI Consumer Trust Research
 - Better understand how to introduce science and technical information about agriculture and food, so they are considered in the social decision-making process.



When Science and Consumers Collide

How do we connect?

- 2014 CFI Consumer Trust Research
 - Better understand communication channels and processes used by Moms, Millennials, Foodies and Early Adopters when forming attitudes and opinions about issues in agriculture and food.



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Science Denied: The Challenge of Introducing Complex, Controversial Issues

- Breaking down communication barriers is critical to fostering informed decision making and encouraging technology and innovation in society's best interest.



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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.



Trusted Sources - The “Mom” Tribe

What information sources have you used to come to your conclusions 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.”

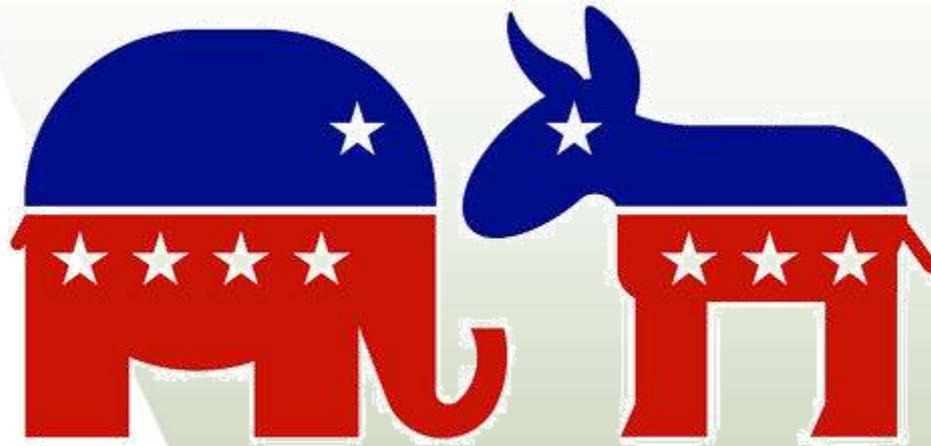


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Why Facts Alone Don't Drive Decisions

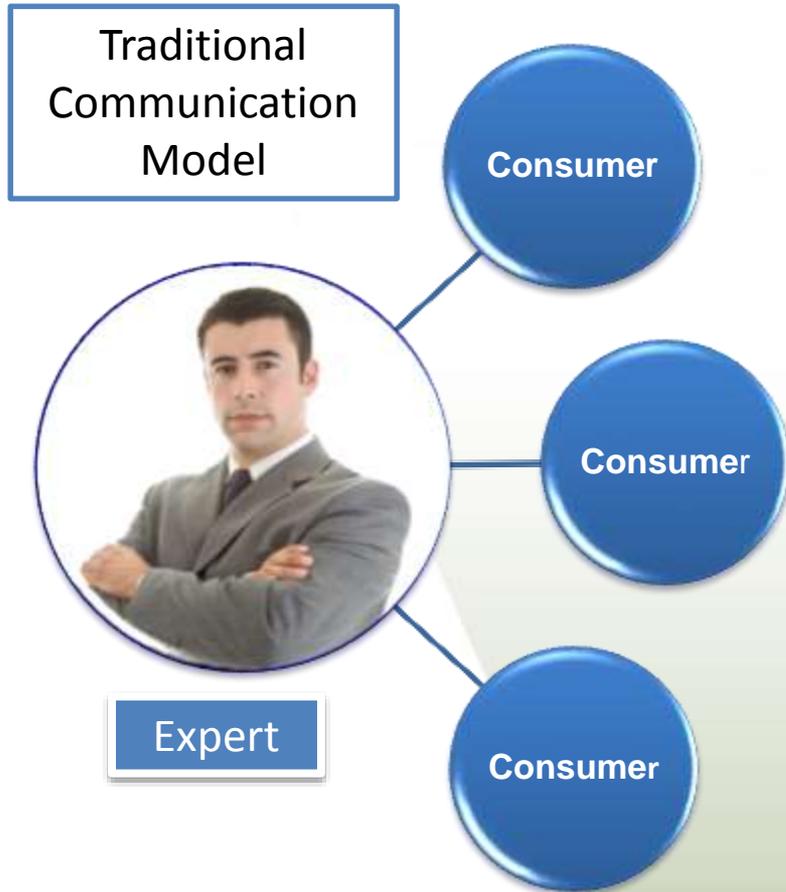
Confirmation Bias

- Tendency for people to favor information that confirms existing beliefs.

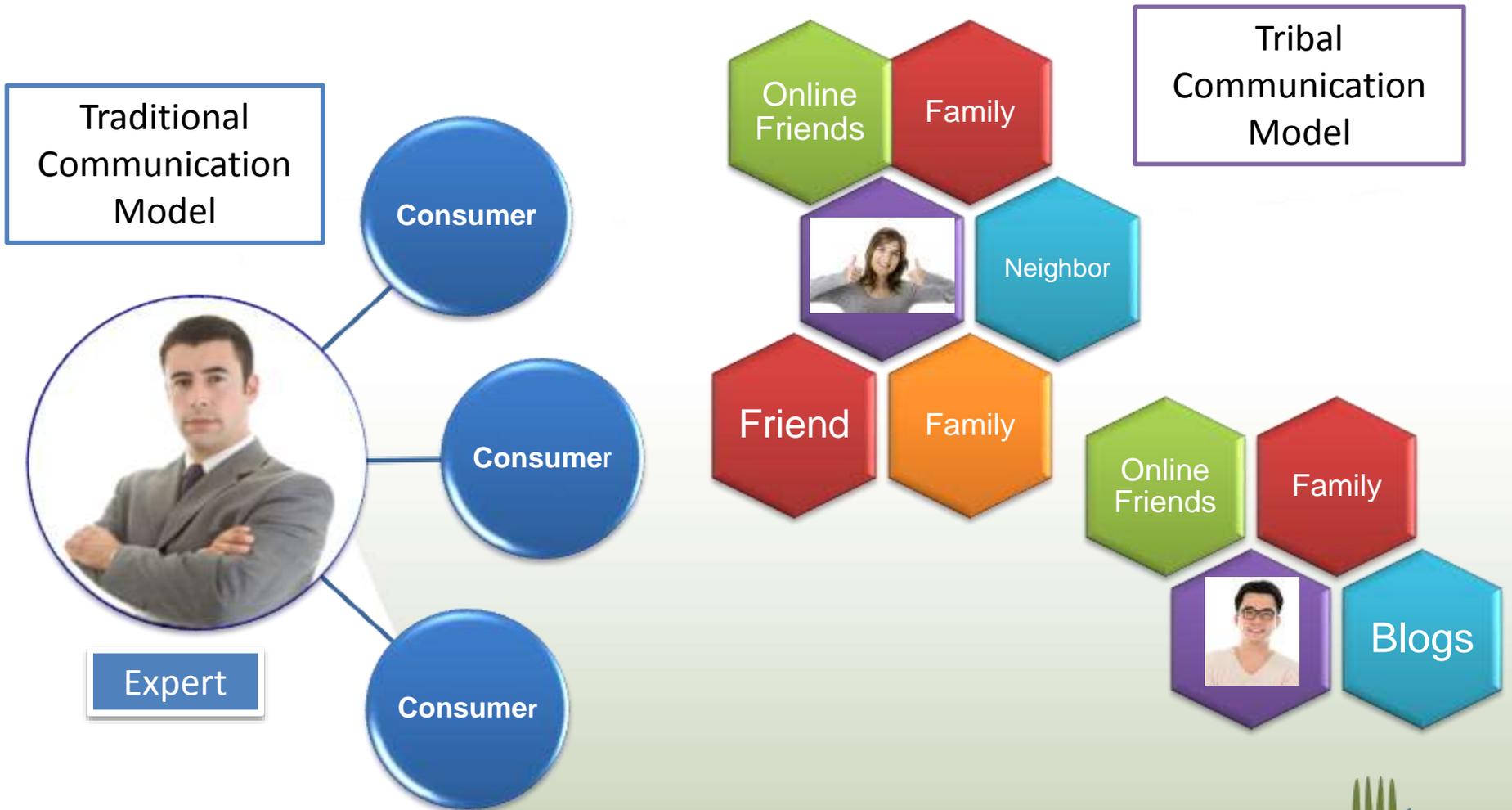


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Online Communication is Tribal/Insular



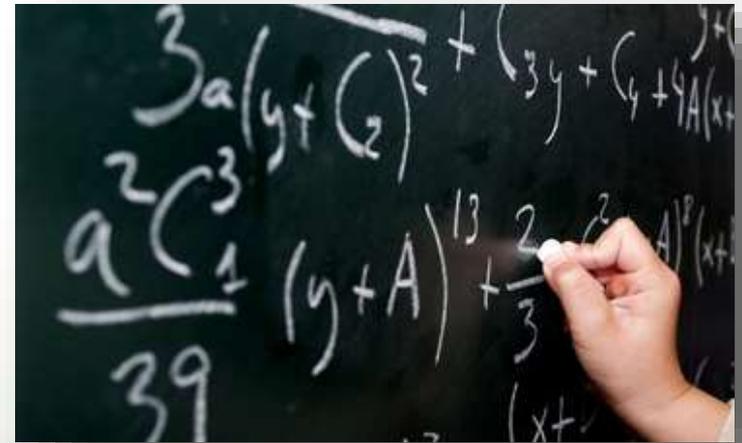
Online Communication is Tribal/Insular



We are All Exposed to Complex Issues

We're Not Qualified to Evaluate

- We make decisions and process information based on bounded rationality (our access to information, our cognitive ability to understand the information and the time we allocate to the information/decision process).
- This leads to confusing correlation with causation, drawing conclusions from anecdotes, etc.
- Not being expert does not preclude having a strong opinion



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Food Shaming/Mom Guilt/Tribal Shunning

How do you make food choices?

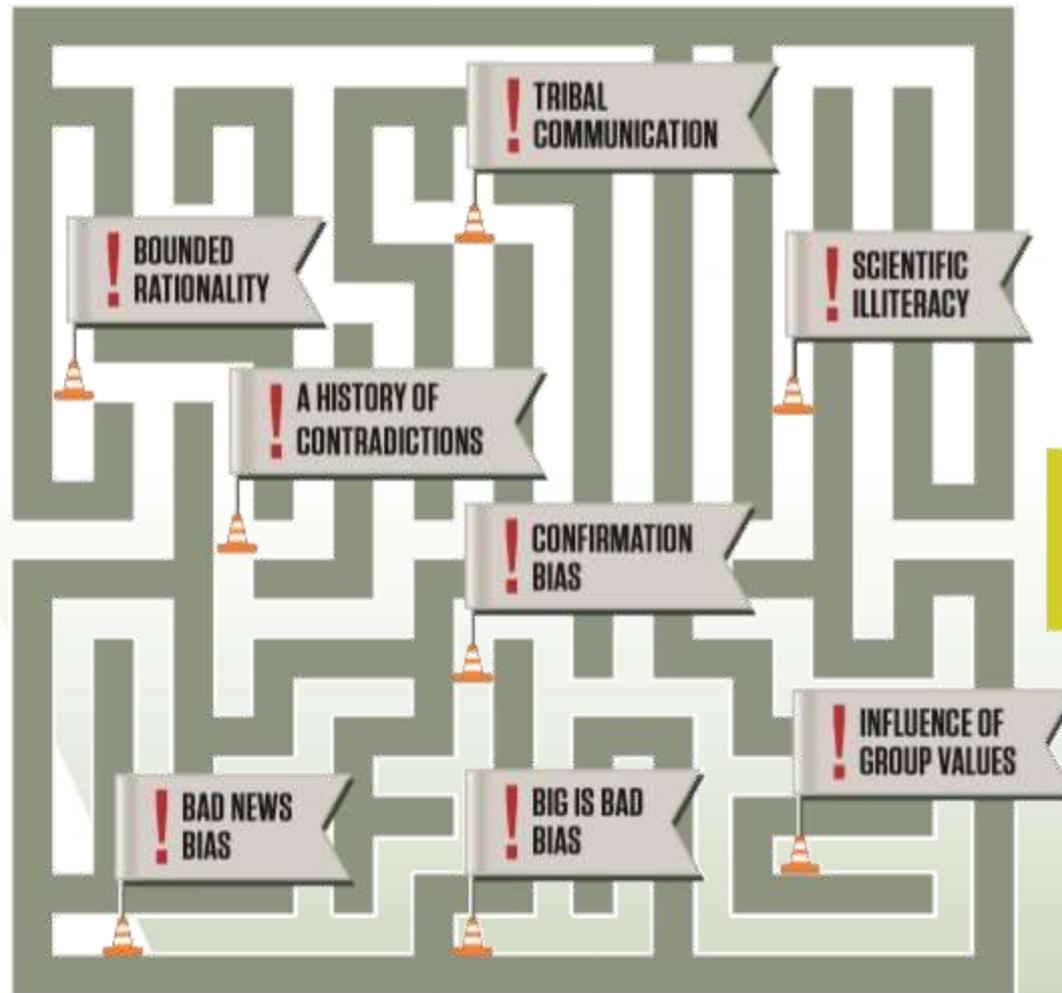


Lisa: “I think mom guilt is a huge factor. If someone is telling you something is dangerous, for example fructose, and you hear the message more than once you owe it to yourself to research it or quit consuming it. I can’t keep giving my kids fructose if there’s a potential problem. We have to do our best job.”



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The Decision-Making Maze



**INFORMED
DECISION
MAKING**



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Social/Consumer Decision Making



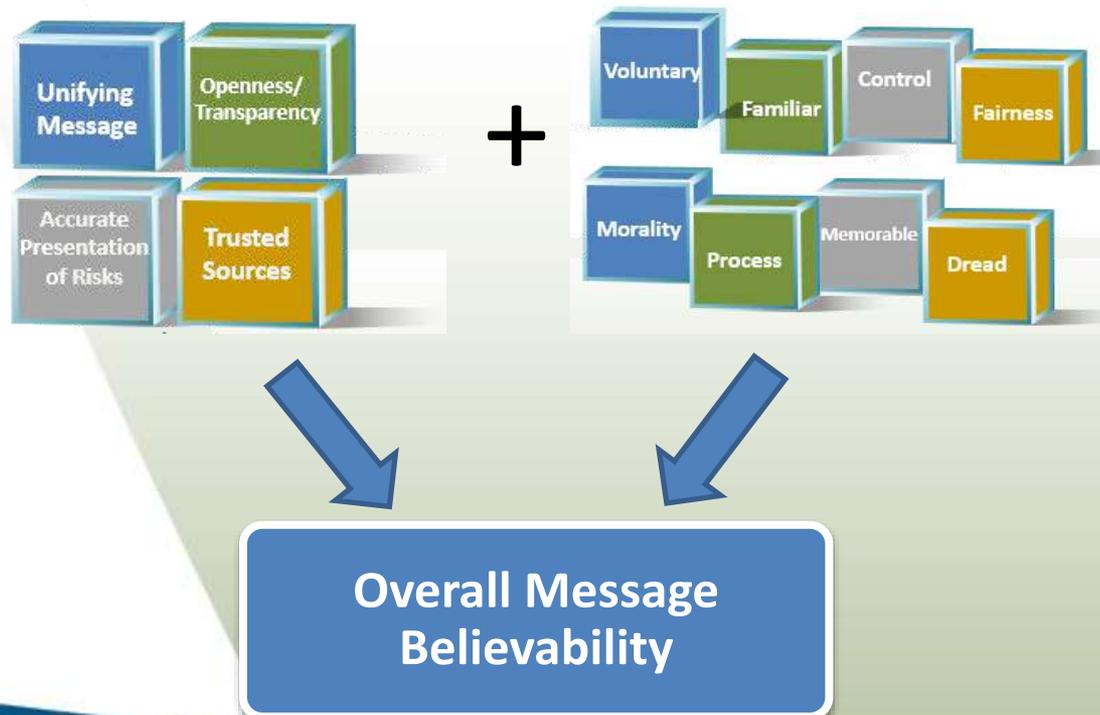
Informed decisions
through better
communication.



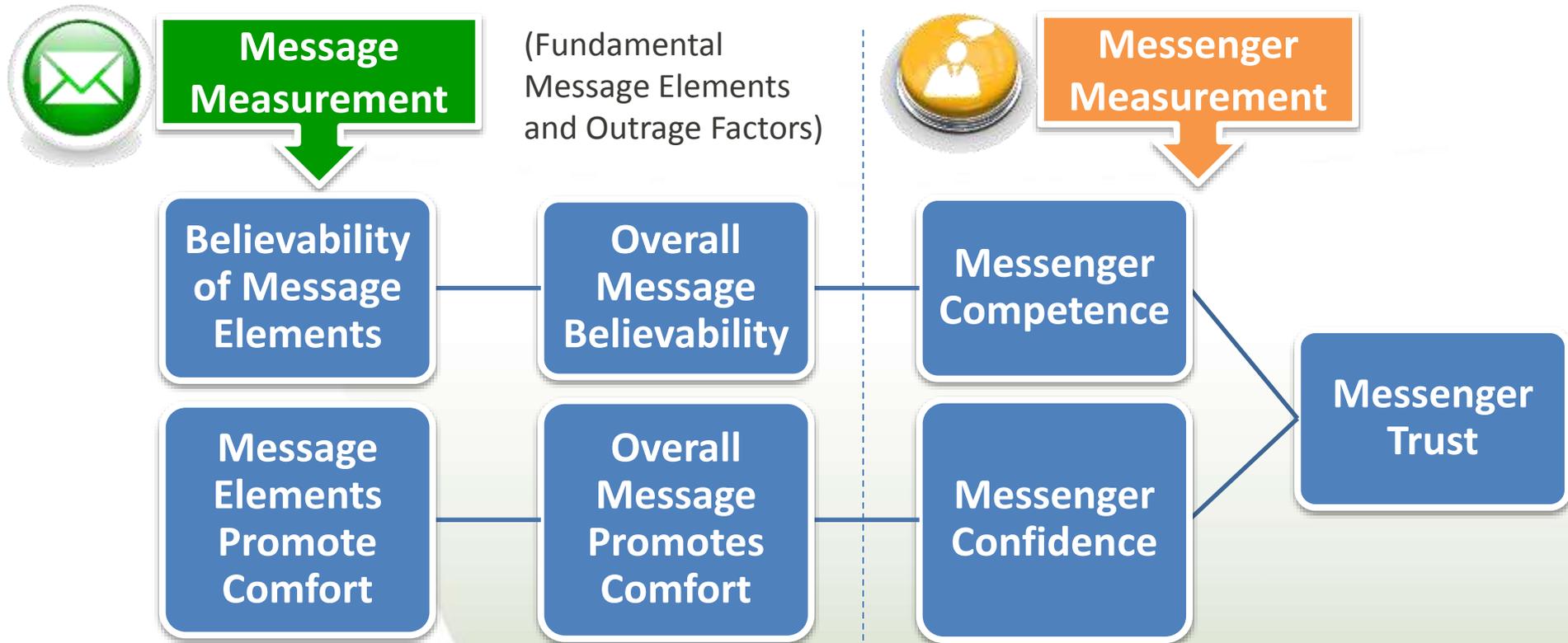
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Theoretical Approach to Measurement

- Literature review → Fundamental Message Elements
- Outrage Factors = impact the degree to which consumers believe messages and trust the messenger.
- Fundamental Message Elements + Outrage Factors



2014 Study Focus: Measuring MESSAGE Acceptance and Trust in the MESSENGER



What information needs to be included when introducing technical and/or controversial information?



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→ Analyzing message elements



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Most Impactful Elements for Believability

Fundamental Message Elements

Unifying Message: Singular, compelling message that touches the deeper drivers of human behavior - values

Accurate Presentation of Risks: Present known risks since they “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



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Message Examples

Unifying Message:

- What is true about water that links to the values of California residents?
- There are few things in life more satisfying than a cold drink of water on a hot day – and access to consistently available, safe water is something we all want and deserve.



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Message Examples

Accurate Presentation of Risks:

- What risks are known? / What risks are unknown?
- California's water supply is in a challenged state. We're experiencing the worst drought in 1,200 years, and mandatory water use restrictions have officially gone into effect for some citizens. Food production is at the heart of many of the discussions about water; hard and important questions are being asked of this industry, including how to decrease the amount of water used while still growing/raising food, and whether some foods should even continue to be produced here.



Message Examples

Openness/Transparency:

- Lay out both sides of the story. Don't oversimplify.
- Be honest; tell the *whole* truth.
- In farming, access to water is a necessity. As consumers, access to water is a necessity. All Californians, including those responsible for growing and raising food, are faced with questions about whether water will remain consistently available.
- The agriculture industry is at the center of many questions and much debate.

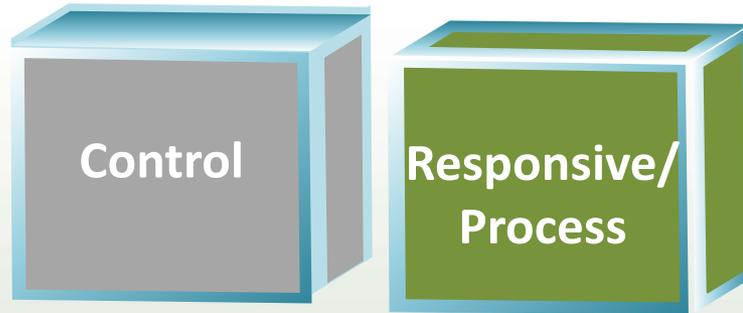


Most Impactful Elements for Believability

Outrage Factors

Control: Government agencies address risks competently

Process: Company/Organization/Agency is listening, engaging and providing information



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Message Elements

Control:

- Is the industry complying with regulations?
- Is the industry working to provide the latest status and progress updates to government officials and regulatory agencies?
- Is the industry working with government agencies to reduce risks?



Message Elements

Process:

- Is the CA Dept of Food and Agriculture working to actively gather concerns and input from, as well as provide updates on industry's progress to California's citizens and other industry stakeholders?
- Where can individuals provide their input?
- How frequently are updates provided?



Which Messengers are Most Trusted?



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It depends...



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Theoretical Approach to Measurement

- Scenarios were developed using the Fundamental Message Elements (included in all scenarios) and Outrage Factors (different sets included in each scenario)
- Scenarios were also written in different “voices” to test the trust in the messenger: Mom scientist, Federal government scientist and a Peer “who shares my interest about food.”



Mom Scientist
(confidence +
competence)



Govt. Scientist
(competence)



Peer
(confidence)



Overall, Mom Scientists and Govt. Scientists Viewed as the Trusted Sources of Antibiotic Resistance Information



Mom Scientist

Before Scenarios:

Showed the **Highest** Average Trust Score Among the Three Messengers

After Scenarios: Average Trust Scores were Higher After the Scenario in 2 out of 3 Antibiotic Resistance Scenarios; **Highest in 2 of 3 Scenarios**



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Overall, Mom Scientists and Govt. Scientists Viewed as the Trusted Sources of Antibiotic Resistance Information



Govt. Scientist

Before Scenarios:

Showed the **Lowest** Average Trust Score Among the Three Messengers

After Scenarios: Average Trust Scores were Higher After the Scenario in All 3 Antibiotic Resistance Scenarios;

Highest in 1 of 3 Scenarios



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Overall, Mom Scientists and Govt. Scientists Viewed as the Trusted Sources of Antibiotic Resistance Information



Peer



Before Scenarios:

Showed the **Second Highest** Average Trust Score Among the Three Messengers

After Scenarios: Average Trust Scores were Lower After the Scenario in All 3 Antibiotic Resistance Scenarios; **Lowest in All 3 Scenarios**



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Based on Composite Value Scores, Mom Scientist and Govt. Scientist are Viewed as the Best Source for Antibiotic Resistance Information



Moms, Foodies, Millennials,
Early Adopters:

Composite Value Scores

- Shows the Highest Composite Value Score for **Mom Scientist in 2 of 3** Antibiotic Resistance Scenarios; Govt. Scientist in Other Scenario.



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Overall, Mom Scientists and Govt. Scientists Viewed as the Trusted Sources of GM Food Information



Mom Scientist



Before Scenarios:

Showed the **Highest** Average Trust Score Among the Three Messengers

After Scenarios: While Average Trust Scores were Lower After the Scenario in Both GM Foods Scenarios, They were **Highest in Both Scenarios**



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Overall, Mom Scientists and Govt. Scientists Viewed as the Trusted Sources of GM Food Information



Govt. Scientist



Before Scenarios:

Showed the **Lowest** Average Trust Score Among the Three Messengers

After Scenarios: Average Trust scores were higher after the scenario in all GM Food Scenarios; **Second in Both Scenarios**



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Overall, Mom Scientists and Govt. Scientists Viewed as the Trusted Sources of GM Food Information



Peer



Before Scenarios:

Showed the **Second Highest** Average Trust Score Among the Three Messengers

After Scenarios: Average Trust scores were **Lowest in Both Scenarios**



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Trust in Sources Changed Somewhat from Before and After the GM Food Scenarios



Moms & Early Adopters

Before Scenarios

- Showed Highest Average Trust Scores for **Mom Scientists**, Followed by Peers and Govt. Scientist.



After Scenarios

- Showed Highest Average Trust Scores for **Mom Scientists** on Both Scenarios; Govt. Scientist Second; Peers Last on All.



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Trust in Sources Changed Somewhat from Before and After the GM Food Scenarios



Millennials

Before Scenarios

- Showed Highest Average Trust Scores for **Mom Scientists**, Followed by Peers and Govt. Scientists.

After Scenarios

- Showed Highest Average Trust Scores for **Mom Scientists** on 1 of 2 Scenarios; **Govt. Scientist** Highest in 1 of 2 Scenarios; Peers last on both.



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Trust in Sources Changed Somewhat from Before and After the GM Food Scenarios



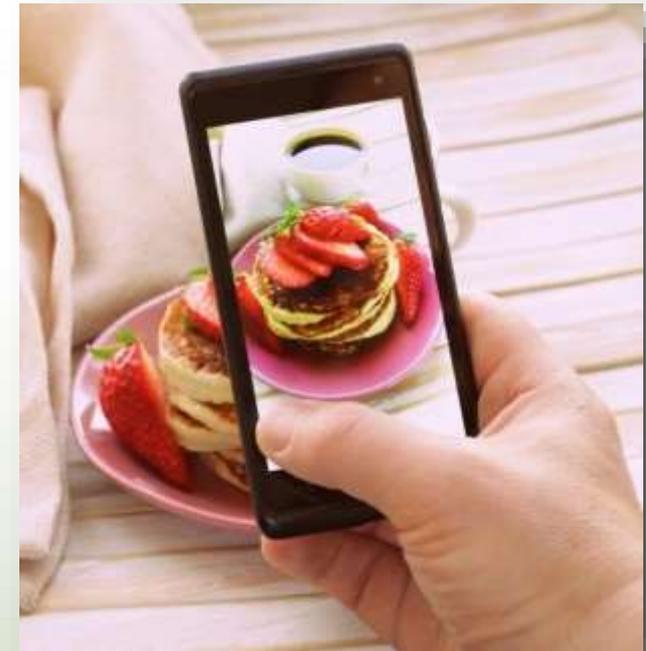
Foodies

Before Scenarios

- Showed Highest Average Trust Scores for **Mom Scientists**, Followed by Peers and Govt. Scientist.

After Scenarios

- Showed Highest Average Trust Scores for **Govt. Scientists** on both scenarios; Mom Scientist second on 1 scenario; Peers second on 1 scenario.



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Key Takeaways



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Recommendations

Believability is a key driver in creating trusted information.

Focus on Fundamental Message Elements and Outrage Factors to develop meaningful information that resonates with the public, and reinforces transparency.



Identify the groups you would like to engage.

Listen to the groups' concerns and understand their values before developing a communications and outreach strategy.



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Putting the Research to Work

Go to your stakeholders.

Today's monitoring technology allows you to identify the digital and physical communities where conversations about food are taking place. Select those communities where answers are needed, and develop an engagement strategy.



Speak their language.

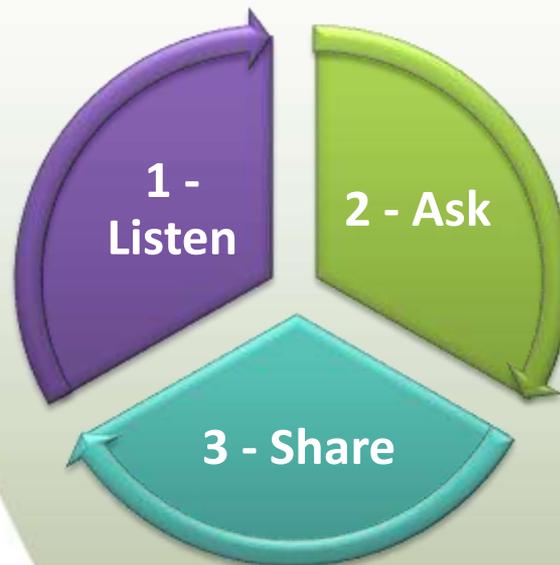
Choose credentialed sources whose values align with the values of the stakeholders. This allows sources to connect.



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Putting the Research to Work

Develop a values-based engagement strategy that starts by embracing skepticism through listening.
Build a relationship before sharing information.
Understand and respect the group expectations and cultural norms. Connect through shared values.



Putting the Research to Work

Commit to engaging over time.

Building trust is a process, not an event. Continued engagement and authentic transparency build trust.



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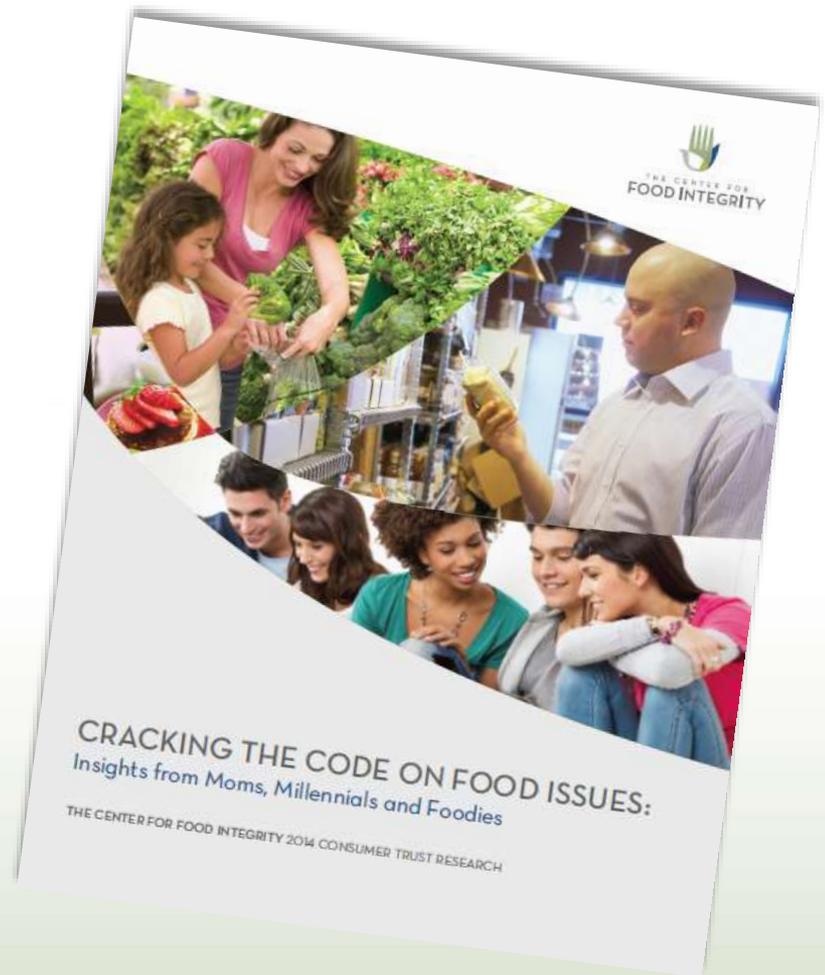
Research Summary

Summary report available at:

www.foodintegrity.org

For more information or presentations please contact:

learnmore@foodintegrity.org



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Questions?

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Cracking the Code on Food Issues

Insights into Moms, Foodies
and Millennials

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