Building Consumer Trust and Confidence in Today’s Food System

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Freedom to Operate
Social License
**Social License**

**Definition:** The privilege of operating with minimal formalized restrictions (legislation, regulation, or market requirements) based on maintaining public trust by doing what’s right.

**Public Trust:** A belief that activities are consistent with social expectations and the values of the community and other stakeholders.
The Social License To Operate

<table>
<thead>
<tr>
<th>Flexible</th>
<th>Rigid</th>
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</thead>
<tbody>
<tr>
<td>Responsive</td>
<td>Bureaucratic</td>
</tr>
<tr>
<td>Lower Cost</td>
<td>Higher Cost</td>
</tr>
</tbody>
</table>

Social License
- Ethics
- Values
- Expectations
- Self regulation

Social Control
- Regulation
- Legislation
- Litigation
- Compliance

Tipping Point
- Single triggering event
- Cumulative impact

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Earning and Maintaining the Social License
(Sapp/CMA)
Trust
Earning and Maintaining the Social License
(Sapp/CMA)

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*
What Does It Mean?

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

- Theodore Roosevelt
Sustainable Systems

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

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

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

Knowledge

Feelings
Belief

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Values and Ethics in Our Science Based Culture

Why we struggle building trust even though we care and are committed to doing the right thing
Questions of Values and Ethics
Kohlberg’s Moral Hierarchy

Three Levels – Six Stages

1. Pre- Conventional
   • Direct impact on me

2. Conventional
   • Societal expectations

3. Post- Conventional
   • Principle driven

Lawrence Kohlberg, 1927-1987
### Questions of Values and Ethics

#### Kohlberg’s Moral Hierarchy

<table>
<thead>
<tr>
<th>Level</th>
<th>Orientation</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Post Conventional</td>
<td>Universal ethical principle orientation</td>
<td>We have an ethical obligation to our employees, our animals, the environment, our customers and our communities</td>
</tr>
<tr>
<td></td>
<td>Social contract orientation</td>
<td>We comply with all environmental and employment laws and regulations</td>
</tr>
<tr>
<td>Conventional</td>
<td>The “law &amp; order” orientation</td>
<td></td>
</tr>
<tr>
<td></td>
<td>The “good boy / nice girl” orientation</td>
<td></td>
</tr>
<tr>
<td>Pre-Conventional</td>
<td>Personal rewards orientation</td>
<td>We take care of the animals because that’s when we get the best ROI</td>
</tr>
<tr>
<td></td>
<td>Punishment-Obedience</td>
<td></td>
</tr>
</tbody>
</table>

- **Post Conventional**: Principle driven
- **Conventional**: Societal expectations
- **Pre-Conventional**: Direct impact on me
## Questions of Values and Ethics: Kohlberg’s Moral Hierarchy

<table>
<thead>
<tr>
<th>Level</th>
<th>Orientation</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Pre-Conventional</strong></td>
<td>Direct impact on me</td>
<td>Personal rewards, Punishment-Obedience</td>
</tr>
<tr>
<td><strong>Conventional</strong></td>
<td>Societal expectations</td>
<td>The “good boy / nice girl” orientation</td>
</tr>
<tr>
<td></td>
<td></td>
<td>The “law &amp; order” orientation</td>
</tr>
<tr>
<td><strong>Post Conventional</strong></td>
<td>Principle driven</td>
<td>Universal ethical principle orientation, NGO’s, Social contract orientation</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Business</td>
</tr>
</tbody>
</table>
Size and Values

- Size of Organization
- Perception of Shared Values
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Thank You to the 2009 Consumer Trust Research Sponsors
Qualitative research in 2009 study

- “What will cause consumers to grant more social license?”
- Eight consumer focus groups
  - April 2: Des Moines, IA
  - April 7: Syracuse, NY
  - April 8: Nashville, TN
  - April 13: Fresno, CA
Two Observations

- **Uninterested and uninformed.**
  
  - "Give me safe food, and I will trust you to give me safe food. I will trust you (farmers) until you do something to break that trust."
    
    – Connie, Nashville focus group
  
  - “They could let us know more about what they do… I’ve never been on a farm, I don’t know what they do.”
    
    – Judy, Des Moines group

- **Trust farmers but aren’t sure contemporary production is still farming.**

  - "Large producers are about the money and rushing production with antibiotics… Small farmers are concerned about their name…"
    
    – Consuela, Nashville focus group
  
  - "There is a difference: a farmer grows and sells locally with ethics, whereas commercial producers are all about the paycheck."
    
    – Maria, Nashville focus group
The Challenge

• Building trust and confidence in the contemporary food system among a public that is largely uninterested and uninformed.

• The contemporary food system is not perceived as being consistent with the understanding or values of consumers or with the positive attributes historically assigned to farmers.

• Voices questioning current food system practices are increasing in number, volume and impact.
FOOD, INC.

Remove empowerment from the table, change the food system, change the society.

Want to Save the Planet?
MAKE A GREENER BURGER

Forget Local, Eat Organic.

Desire

What Animals Think

FEAR & THE FLU

THE TEA PARTY'S BIBLE: HAMAS TALKS PEACE

THE FIGHT AGAINST CHILDHOOD OBESITY

By Michelle Obama

NewswEEK

TIME

What Animals Think

NewswEEK

NEW AGE OF PANDEMIC

By Laurie Garrett
Past research has shown that the Adopter Segments are normally distributed in a social system/market (bell curve).
Attributes of Early Adopters

• Socio-Economic
  – More educated
  – Higher social status
  – Greater upward mobility

• Communication behavior
  – Larger interpersonal networks
  – Greater exposure to mass media and interpersonal communication
  – Information seekers
  – More knowledge of innovations
  – Opinion leaders

• Personality
  – Greater empathy
  – Less dogmatic
  – Greater ability to deal with abstractions
  – Greater rationality
  – Higher intelligence
  – More favorable toward change
  – Able to deal with uncertainty and risk
  – More favorable attitude toward science
  – Less fatalistic
  – Have higher aspirations

Adapted from Rogers - 2003
Adopter Classification Scheme

• Adopter classification is issue dependent
  – Consumers may be an Early Adopter in one issue area, such as food safety, but may be an Early or Late Majority in another issue such as Humane Treatment of Farm Animals

• Adopter classification is accomplished in this study through a single question for each key issue

• Respondents do not see the Adopter category labels, but are designated as specific Adopter categories based on their response to the question

• Self-classification is a reflection of attitudes and beliefs, not necessarily behavior.
2010 Consumer Trust Qualitative Research

Summary Slides

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Thank You
2010 Consumer Trust Research Sponsors
• 2010 qualitative research with ONLY early adopters.

• Eight focus groups in four cities between April 26 and May 1, 2010.
  – Concord, California
  – Minneapolis, Minnesota
  – Atlanta, Georgia
  – Philadelphia, Pennsylvania

• Two focus groups were conducted at each location.
  – One female-only group and one male-only group per location.
  – 63 total participants (7-8 per group)
Key Findings

• Nutrition, health and food safety (which are seen as related to health) were the topics of greatest concern to most Early Adopters.

• Early Adopters are deeply skeptical and distrustful of claims that improvements in technology and innovation in food production/processing are beneficial to the health and welfare of consumers, the environment or animal well-being.

• Many Early Adopters had difficulty accepting that food production MUST increase in efficiency to feed a growing population, because they feel this will further industrialize agriculture and probably make food less healthy.

• Many Early Adopters felt that it would be more socially responsible and healthier for consumers to eat more organic foods, buy foods locally and eat what is in season.

• Cheap food was generally considered unhealthy. Many Early Adopters felt that they had to choose between feeding their family lower quality “processed” food that was within their budget or buying more expensive fresh foods.
Respondent Profile

- 60% female and 40% male
- 50% were primary shoppers in the house
- ~89% shop once or twice a week
- Representative of the typical U.S. food shopper regarding:
  - Education
  - Income
  - Political orientation
  - Vegetarian practices
  - Consumer advocacy
Concern About Issues

- Consumers were asked to indicate how concerned they were about several life and current event issues.

- Used a 0 to 10 scale where “0” meant they had no concern about the issue and “10” meant they were very concerned about the issue:
  - 0 to 3 ratings indicate relatively low level of concern
  - 4 to 7 ratings indicate relatively moderate level of concern
  - 8 to 10 ratings indicate relatively strong level of concern

Early adopters exhibit a significantly higher level of concern than other adopter segments.

Women were more likely to be early adopters than men on the four issues tested.
Highest and Lowest Concerns

• **Highest Concerns** (based on mean scores):
  – The U.S. Economy (8.07)
  – Rising Health Care Costs (7.98)
  – Unemployment in the U.S. (7.94)
  – Rising Energy Costs (7.76)
  – Personal Financial Situation (7.71)
  – Rising Cost of Food (7.70)

• **Lowest Concerns** (based on mean scores):
  – Global Warming (6.00)
  – Having Enough Food to Feed People in Developing Countries (5.59)
Innovator Self-Classification Along Food Safety Issues

<table>
<thead>
<tr>
<th>Segments</th>
<th>Total (A)</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Base)</td>
<td>(1009)</td>
</tr>
<tr>
<td>I’m quick to form opinions on food safety and rarely rely on others for input (Innovator)</td>
<td>10.5%</td>
</tr>
<tr>
<td>I actively seek information on food safety issues so I can weigh the issues and have informed opinions (Early Adopter)</td>
<td>31.9%</td>
</tr>
<tr>
<td>I usually make up my mind about food safety issues after others have debated the issues at length (Early Majority)</td>
<td>18.3%</td>
</tr>
<tr>
<td>I don’t really think about food safety issues unless I happen to hear something on the radio or see something on TV (Late Majority)</td>
<td>33.3%</td>
</tr>
<tr>
<td>I only think about food safety issues if I’m forced to (Laggard)</td>
<td>6.0%</td>
</tr>
</tbody>
</table>

• One-third of respondents (31.9%) self-classified themselves as Early Adopters along Food Safety issues.
Females were significantly more likely than males to classify themselves as Early Adopters along Food Safety issues, while males were more likely to self-classify as Early Majority and Laggard.
Our food is safe, wholesome and nutritious thanks to advanced technologies and responsible practices used in today’s food system. U.S. government data indicates 99.99 percent of all meals are consumed safely without incident.

Inspection and training programs developed by government, food retailers, and restaurants emphasize responsible practices to ensure the safety of food consumed at home and in restaurants.

The role of farmers in the U.S. food system includes an ethical obligation to grow safe, wholesome food. Only government-approved antibiotics can be used in animals raised for food and training and certification programs emphasize the importance of working closely with veterinarians to assure safe food and proper animal care.

*Significance at a 90% confidence level or more, indicating there is at least a 90% probability the survey results are accurate across the entire population.
Because of strict government monitoring the incidence of foodborne illnesses in the United States has decreased dramatically in the last 100 years. The responsible use of new farming advances helps ensure a safe, wholesome U.S. food supply.

The Food and Drug Administration’s Food Code assists health departments and food inspection entities at all levels of government by providing them a scientifically sound basis for regulating restaurants and grocery stores. Restaurants and grocery stores train employees and managers according to the Food Code in order to fulfill their ethical obligation to provide safe, wholesome food products for U.S. consumers.

*Significance at a 90% confidence level or more, indicating there is at least a 90% probability the survey results are accurate across the entire population.
Building Humane Treatment of Farm Animals Trust
Innovator Self-Classification Along Humane Treatment of Animals Issues

<table>
<thead>
<tr>
<th>Segments</th>
<th>Total (A)</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Base)</td>
<td>(2002)</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>
</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>
</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>
</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>
</tr>
<tr>
<td>I only think about humane treatment of farm animals issues if I’m forced to (Laggard)</td>
<td>9.2%</td>
</tr>
</tbody>
</table>

- One-fourth of respondents (25.1%) self-classified themselves as Early Adopters along Humane Treatment of Animals issues.
Innovator Self-Classification Along the Humane Treatment of Farm Animals Issues by Gender

- Females were significantly more likely than males to classify themselves as Early Adopters along the Humane Treatment of Farm Animals, while males were more likely to self-classify as Laggard.
• Farmers have an ethical obligation to make sure the animals on their farm are well cared for and scientific research shows raising animals indoors has resulted in improved animal health over the last 50 years.

• Today’s farmers show their commitment to responsible food production by participating in training and certification programs that emphasize the importance of working closely with veterinarians to ensure animals receive proper care. On-farm verification by independent 3rd parties validate that these programs are properly implemented.

*Significance at a 90% confidence level or more, indicating there is at least a 90% probability the survey results are accurate across the entire population.
Building Nutrition Trust
## Innovator Self-Classification Along Nutrition Issues

<table>
<thead>
<tr>
<th>Segments</th>
<th>Total (A)</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Base)</td>
<td>(1009)</td>
</tr>
<tr>
<td>I’m quick to form opinions on nutrition and rarely rely on others for input (Innovator)</td>
<td>9.9%</td>
</tr>
<tr>
<td>I actively seek information on nutrition issues so I can weigh the issues and have informed opinions (Early Adopter)</td>
<td>45.4%</td>
</tr>
<tr>
<td>I usually make up my mind about nutrition issues after others have debated the issues at length (Early Majority)</td>
<td>20.1%</td>
</tr>
<tr>
<td>I don’t really think about nutrition issues unless I happen to hear something on the radio or see something on TV (Late Majority)</td>
<td>16.7%</td>
</tr>
<tr>
<td>I only think about nutrition issues if I’m forced to (Laggards)</td>
<td>7.9%</td>
</tr>
</tbody>
</table>

- Almost half of respondents (45.4%) self-classified themselves as Early Adopters along Nutrition issues.
Innovator Self-Classification Along Nutrition Issues by Gender

- Females were significantly more likely than males to classify themselves as Early Adopters along Nutrition issues, while males were more likely to self-classify as Late Majority and Laggard.
The availability of healthy, affordable food is critical to the physical and intellectual development of children. Restricting the ability to produce the food we need will reduce food availability and increase food prices which will negatively impact nutrition and obesity.

A balanced diet including a variety of foods is a sound strategy for good nutrition. Government recommended dietary guidelines include a good mix of all food groups, including meat, milk and eggs.

Food processing technologies such as canning, freezing and packaging allow a wide variety of foods to be available for U.S. consumers year-round. Maintaining a variety of food choices is essential to ensuring access to a balanced diet that helps children and adults remain healthy and strong.

*Significance at a 90% confidence level or more, indicating there is at least a 90% probability the survey results are accurate across the entire population.
Messages That Matter - Nutrition

- Good nutrition is the foundation on which children build future achievement. Restricting the availability of healthy, affordable food choices is detrimental to the physical and intellectual development of young people in the U.S. and abroad.

- U.S. food companies are offering more products with reduced fats, sodium and sugars in order to ensure access to a wholesome diet for U.S. consumers.

*Significance at a 90% confidence level or more, indicating there is at least a 90% probability the survey results are accurate across the entire population.
Building Responsible Use of Technology and Innovation for Food Production Trust
## Innovator Self-Classification
### Along the Responsible Use of Technology and Innovation for Food Production Issues

<table>
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</thead>
<tbody>
<tr>
<td><em>(Base)</em></td>
<td>(2002)</td>
</tr>
<tr>
<td>I’m quick to form opinions on the responsible use of technology and innovation for food production and rarely rely on others for input <em>(Innovator)</em></td>
<td>9.4%</td>
</tr>
<tr>
<td>I actively seek information on the responsible use of technology and innovation for food production issues so I can weigh the issues and have informed opinions <em>(Early Adopter)</em></td>
<td>28.3%</td>
</tr>
<tr>
<td>I usually make up my mind about the responsible use of technology and innovation for food production issues after others have debated the issues at length <em>(Early Majority)</em></td>
<td>23.6%</td>
</tr>
<tr>
<td>I don’t really think about the responsible use of technology and innovation for food production issues unless I happen to hear something on the radio or see something on TV <em>(Late Majority)</em></td>
<td>29.5%</td>
</tr>
<tr>
<td>I only think about the responsible use of technology and innovation for food production issues if I’m forced to <em>(Laggards)</em></td>
<td>9.2%</td>
</tr>
</tbody>
</table>

- Twenty-eight percent classified themselves as Early Adopters along the Responsible Use of Technology and Innovation for Food Production issues.
Females were significantly more likely than males to classify themselves as Early Adopters along the Responsible Use of Technology and Innovation for Food Production, while males were more likely to self-classify as Early Majority and Laggard.
Food production must double on the same amount of land by 2050 in order to meet the basic needs of a rapidly growing global population. This will not happen without increased use of responsible technological advancements in farming.

Although world population has doubled in the last forty years the amount of land devoted to growing food has remained about the same because of technological advances that allow today’s farmers to produce more with fewer resources. Scientific study concludes these more intensive farming methods are better for the environment and use fewer natural resources.

Farmers’ commitment to the responsible use of technology has translated to lower food prices, fewer greenhouse gases and reduced use of agricultural chemicals.

*Significance at a 90% confidence level or more, indicating there is at least a 90% probability the survey results are accurate across the entire population.*
“It is not the strongest species that survive, nor the most intelligent, but the ones who are most responsive to change.”

- Charles Darwin
Consumer Perception

- The public senses change in the way food is produced but does not understand

- Lack of understanding creates opportunity for activists and detractors to undermine consumer trust and confidence in today’s meat industry

- The food system must effectively communicate that our practices are ethically grounded, scientifically verified and economically viable to build trust in today’s systems
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