Cracking the Code on Food Issues
Insights from Moms, Millennials and Foodies
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American Farm Bureau Federation®
Mom, Millennials and Foodies

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.

Moms 30%

Millennials 37%

Foodies 21%

N=2005
Consumer Concerns About Life and Current Events
All of the Most Concerning Life Issues are Beyond the Consumer’s Direct Control

Women were more concerned than men about most issues

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

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

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%)

*Top Box ratings (8-10)
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)
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.
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 in building trust than demonstrating competence

Trust research was published in December 2009 - Journal of Rural Sociology
Sustainable Balance

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

Scientifically Verified
- Data Driven
- Repeatable
- Measurable
- Specific

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

Knowledge

Feelings
- Belief
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.
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.
Online Communication is Tribal/Insular

Traditional Communication Model

Expert

Consumer

Consumer

Consumer

Tribal Communication Model

Online Friends

Family

Neighbor

Friend

Family

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.”
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.”
Big is Bad

Shared Values = Trust

Inverse relationship between size and the perception of shared values
2014 Research: Making Science Relevant

- Consumer concern and skepticism is understandable.
- Consolidation, integration and application of technology prompts concerns about who benefits.
- Goal – not to win scientific or social argument but to find more meaningful and relevant ways to introduce science and technology.
The Decision-Making Maze

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

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Social/Consumer Decision Making

ANTHROPOLOGY

PSYCHOLOGY

Sociology

Key insights into decision making
2014 Study Focus: Measuring MESSAGE Acceptance and Trust in the MESSENGER

Fundamental Message Elements and Outrage Factors

Message Measurement

Believability of Message Elements

Message Elements Promote Comfort

Overall Message Believability

Overall Message Promotes Comfort

Believability

Messenger Competence

Messenger Confidence

Comfort

Messenger Trust

 mug
Building Blocks of Technical Messages

Fundamental Message Elements

- Unifying Message
- Openness/Transparency
- Accurate Presentation of Risks
- Trusted Sources
## Fundamental Message Elements

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Unifying Message</strong></td>
<td>Singular, compelling message that touches the deeper drivers of human behavior - values</td>
</tr>
<tr>
<td><strong>Openness/Transparency</strong></td>
<td>Acknowledge both sides of the story, provide level of depth so it does not look like “holding back,” avoid oversimplification</td>
</tr>
<tr>
<td><strong>Accurate Presentation of Risks</strong></td>
<td>Present known risks since known risks “trump” unknown risks by accurately communicating safety facts</td>
</tr>
<tr>
<td><strong>Trusted Sources</strong></td>
<td>Leveraging trustworthy sources (use credible expert sources)</td>
</tr>
</tbody>
</table>
Building Blocks of Technical Messages (Continued)

Outrage Factors

- Voluntary
- Familiar
- Control
- Fairness
- Morality
- Process
- Memorable
- Dread

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### Outrage Factors - Combined in Sets

#### Set 1
- **Voluntariness:** Voluntary risk is more acceptable than coerced risk.
- **Familiarity:** Unfamiliar risk provokes more outrage than familiar risk.
- **Control:** Government agencies address risk competently.

#### Set 2
- **Fairness:** More outrage if situation perceived unfairly/politically driven.
- **Morality:** Trade-offs perceived to be callous when risk is morally relevant.
- **Process:** Extent of informing and listening.

#### Set 3
- **Memorable:** Negative events make risk easier to imagine.
- **Dread:** If situation becomes too dire, it might be difficult to find positive solution.
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.”
Theoretical Approach to Measurement (Continued)

• Two food industry topics were chosen to serve as the vehicle for testing the impact of the Fundamental Message Elements and the Outrage Factors (Antibiotic Resistance, GM Ingredients in Food).

Please note that the intent of the research is to identify elements in technical messaging that promotes consumer believability in the message and trust in the messenger—not to identify specific messages to promote the two topics.
Which Messengers are Most Trusted?
After rating the believability of the message and rating the degree to which the message promoted comfort with the topic, respondents rated the Messenger on several statements (0 to 10 agree/disagree):

• This person is competent as a source of information about antibiotic resistance/GM ingredients in foods.
• I have confidence in this person as a source of information about antibiotic resistance/GM ingredients in foods.
• I would trust this person as a source of information about antibiotic resistance/GM ingredients in foods.
• This person is a credible source of information about antibiotic resistance/GM ingredients in foods.
• An overall Messenger Composite Value Score was created by combining the scores on these statements.
Based on Composite Value Scores, Mom Scientist and Govt. Scientist are Viewed as the Best Source for Antibiotic Resistance Information

<table>
<thead>
<tr>
<th>Source</th>
<th>Overall Score Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mom Scientist</td>
<td>Overall Shows the <strong>Highest Composite Value Score in 2 of 3 Antibiotic Resistance Scenarios</strong></td>
</tr>
<tr>
<td>Govt. Scientist</td>
<td>Overall Shows the <strong>Highest Composite Value Score in 1 of 3 Antibiotic Resistance Scenarios</strong></td>
</tr>
<tr>
<td>Peer</td>
<td>Shows the <strong>Lowest Composite Value Score in All 3 Antibiotic Resistance Scenarios</strong></td>
</tr>
</tbody>
</table>
Based on Composite Value Scores, Mom Scientist and Govt. Scientist are Viewed as the Best Source for GM Food Information

- **Mom Scientist**
  - Overall Shows the **Highest Composite Value Score** in both GM Food Scenarios

- **Govt. Scientist**
  - Overall Shows the **Second Highest Composite Value Score in Both** GM Food Scenarios

- **Peer**
  - Shows the **Lowest Composite Value Score in Both** GM Food Scenarios
What Promotes Messenger Trust?
Predicting Trust in the MESSENGER

- Overall Message Believability
- Overall Message Promotes Comfort
- Messenger Competence
- Messenger Confidence
- Messenger Trust

Promotes Comfort
Predicting Trust in the MESSENGER: Key Findings

Predicting Trust

• Perceptions of the Messenger’s Competence and the Confidence are strong predictors of Trust in the Messenger.

• Models show that both Competence and Confidence impact trust, but most models show **Confidence** typically carries at least twice the weight in predicting Trust with the Messenger.

Predicting Confidence

• Overall Message **Believability** is more often a stronger predictor of Messenger Confidence than Promotes Comfort with the Topic.

  • Believability of the Message is a strong predictor of Messenger Confidence in all models; in a few models, Promotes Comfort with the Topic is an equally strong predictor.

  • Believability of the Message and Promotes Comfort with the Topic are highly correlated in every model.
Which Elements Most Promote Believability of the Message?
Predicting MESSAGE Believability

Fundamental Message Elements:
- Unifying Message
- Openness/Transparency
- Accurate Presentation of Risks
- Trusted Sources

Outrage Factors:
- Voluntary
- Familiar
- Control
- Fairness

Overall Message Believability
Elements That Impact Message Believability

- Types of Fundamental Message Elements that drive Message Believability include:
  - Risks (significant in 18 models).
  - Openness/Transparency (significant in 17 models).
  - Unifying Message (significant in 11 models).
  - Trusted Sources (significant in 5 models) (Antibiotic Resistance only).

- Types of Outrage Factors that drive Message Believability:
  - Control (significant in 17 models).
  - Process (significant in 12 models).
  - Fairness (significant in 1 model) (GM Foods only).
  - Familiarity (significant in 1 model) (Antibiotic Resistance only).
  - Voluntariness (significant in 1 model) (Antibiotic Resistance only).
# 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.

## Outrage Factors

- **Control**: Government agencies address risks competently.

- **Process**: Company/Organization/Agency is listening, engaging and providing information.
Tracking Attitudes
Additional 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:
  - 0 to 3 ratings indicate relatively low level of agreement.
  - 4 to 7 ratings indicate relatively moderate level of agreement.
  - 8 to 10 ratings indicate relatively strong level of agreement.
“I am confident in the safety of the food I eat.”

2014 Mean 6.47
2013 Mean 6.28

Eight Year Mean

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“I am as confident in the safety of the food I eat as I was a year ago.”

2014 Mean 6.36
2013 Mean 6.08
“Today’s food supply is safer than it was when I was growing up.”

Eight Year Mean

2014 Mean 5.63
2013 Mean 5.19

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“Government food safety agencies are doing a good job ensuring the safety of the food we eat.”

2014 Mean 5.85
2013 Mean 5.66

Seven Year Mean

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Future Webinars

January 15
Summary of 2014 Results

January 22
Insight into Millennials

January 29
Insight into Moms
Future Webinars

February 12
Insight into Foodies

February 26
Insight into Antibiotic Resistance

March 12
Insight into Food with GM Ingredients
Research Summary

24 page summary available online
www.foodintegrity.org

For more information or presentations please contact:
learnmore@foodintegrity.org
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