

# INSIDE THE MINDS OF INFLUENCERS

## **The Truth About Trust**

2016 Consumer Trust Research Summary  
The Center for Food Integrity®



THE CENTER FOR  
**FOOD INTEGRITY**™



THE CENTER FOR  
FOOD INTEGRITY<sup>SM</sup>

## OUR MISSION

Help today's food system earn consumer trust

## OUR VISION

CFI envisions a transparent, sustainable food system in which practices align with consumer expectations and the public discussion is well-informed and balanced.

### We strive to...

- ▶ Be a leading voice in a balanced public conversation about food
- ▶ Align the culture of today's food system with consumer expectations
- ▶ Convene, empower and support food and ag stakeholders to operate in a manner that builds consumer trust

This summary provides a small snapshot of the in-depth findings from the 2016 CFI trust research. Full research results, which include deeper insights, detailed audience segmentation, cross-tabulation and trust-building engagement strategies, are provided to CFI members at no charge and are available for purchase by non-members.

To access the full research report customized for your organization and to inquire about presentations and the benefits of membership, contact CFI at [learnmore@foodintegrity.org](mailto:learnmore@foodintegrity.org) or 816-556-3141.

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## SPEAKERS BUREAU

OUR SPEAKERS GIVE COMPANIES & ORGANIZATIONS THE TOOLS TO EARN CONSUMER TRUST

Keynotes • Interactive Training Seminars • Strategy Session Facilitation • Facilitation of Open Discussion Panels • Social Media Strategy • Traditional Media Strategy • Crisis Training

TO REQUEST ONE OF OUR SPEAKERS FOR YOUR NEXT EVENT, CONTACT

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WHICH CONSUMERS ARE SETTING TRENDS AND SHAPING OPINIONS ABOUT FOOD? WHO ARE THEY TALKING TO? WHAT ARE THEIR MOTIVES AND BEHAVIORS? WHAT TOPICS INTRIGUE THEM? WHICH INFORMATION SOURCES AND BRANDS DO THEY TRUST MOST?

Wouldn't it be nice to know? **Now we do.**

We all have opinions about food: how it's produced, what's in it, who's producing it and how it impacts our health.

However, not all opinions affect change. The latest consumer trust research from The Center for Food Integrity (CFI) identifies the voices that impact the decisions of others as they make choices at the grocery store or form opinions about the products, processes, people and brands that define today's food system.

In fact, CFI's research identifies the two consumer types that are setting trends and driving the conversation, particularly online. At times, these conversations may fuel skepticism and undermine trust in food and agriculture. However, as CFI has long proposed, the values of the food system in many cases are much more closely aligned with consumer values than some may believe. The results from CFI's 2016 consumer trust research shed tremendous light on how to positively affect change in the way the food system communicates with consumers regarding our shared, authentic values.

For nearly a decade, CFI has conducted annual consumer trust research to better understand public attitudes and how to best engage to earn trust. It has helped us define what people are saying and doing.

In 2016, we went a step further to understand why. As the CFI consumer trust model tells us, communicating our shared values is the foundation

for earning trust. Values are all about the *why*.

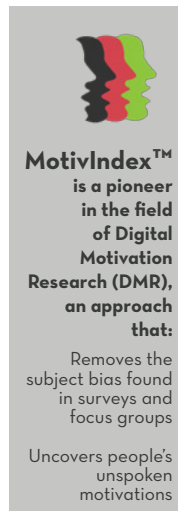
In partnership with digital ethnography pioneers MotivIndex™, we identified five Consumer Types to pinpoint their:

- Values
- Motivations
- Beliefs
- Concerns
- Emotional Triggers
- Behaviors

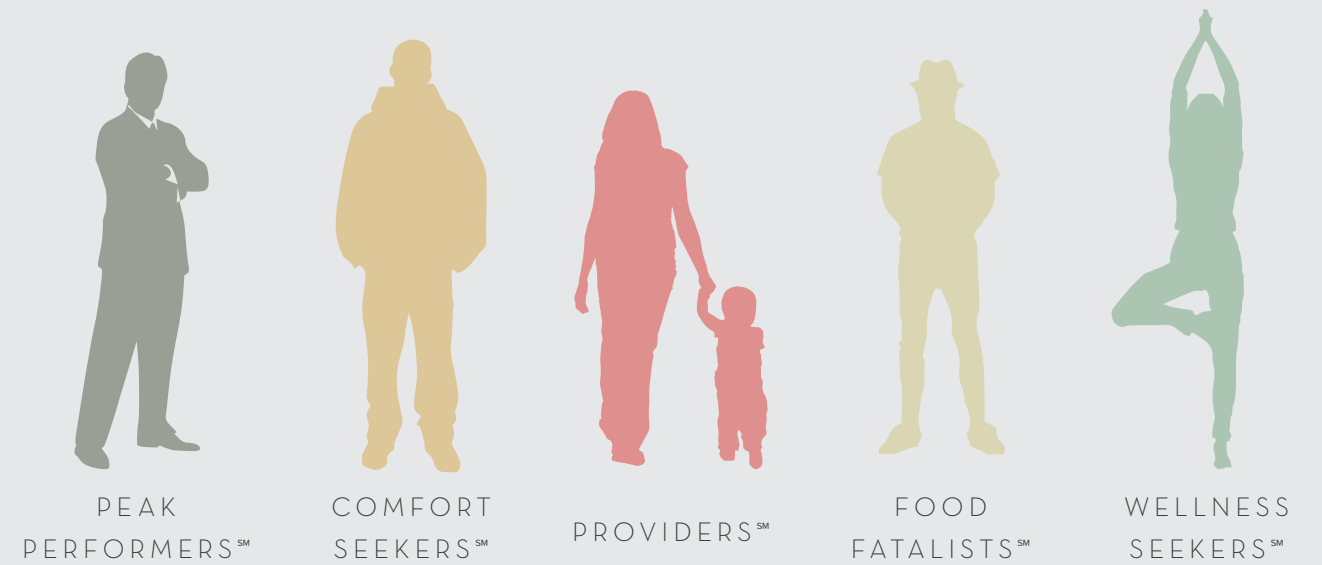
The approach gives us a new level of insight - allowing us to understand how and where they connect online, emerging trends, trusted brands, and sources and channels they use to shape their beliefs and opinions about food and agriculture.

In other words, we can identify who and what are changing beliefs, attitudes and behaviors - understanding why ideas move into or out of the marketplace. In turn, that allows us to identify where our values align, and where and how we engage to earn trust.

In addition to the MotivIndex™ results, our research - as in years past - tracks consumer concerns and trending attitudes on topics ranging from food safety and animal welfare to attitudes about farming and trusted sources of information. An abbreviated summary of the results can be found on page 12 - 18.



When it comes to food, there are five Consumer Types that reflect U.S. population beliefs and attitudes toward food.



Questions We Can Answer About Consumer Types

- Who are they?
- Why do they talk about food-related issues?
- What does food symbolize?
- What do they believe?
- How do they behave?
- Who is driving change?
- What communication channels do they use?
- What information sources do they trust?
- What conversation themes emerge?
- Why do some seek "evolved" food?
- Which brands do they prefer?
- Which foods are "in" and which are "out?"
- Which foods are "on the fence?"

Each Consumer Type has a unique set of motivations, feelings and actions that are directly tied to whether they feel they are **living well** as it relates to food.

Each segment defines living well differently. For example, **Wellness Seekers**™ define it as treating their bodies like a temple and focusing on the future. You're likely to find them at the local farmers market shopping for organic produce and telling others about their healthy lifestyle.

**Comfort Seekers**™, on the other hand, define it as enjoying life's pleasures and living in the moment. Look for them celebrating life with comfort food or taking a break from their stressful routine with a quick burger. Each segment defines living well and the meaning of food uniquely.

The influence that a particular segment has is not necessarily determined by size, but rather share of voice in the public discussion about food and its influence on other segments.



## Influencers Driving Change

The Consumer Types reflect foundational research that illustrates how new ideas or products are adopted by society. For example, our research shows that **Peak Performers<sup>SM</sup>** are one group that influences **Providers<sup>SM</sup>**. The adoption process has been well researched for more than five decades, and the digital ethnography by MotivIndex<sup>TM</sup> allows us to leverage that knowledge in today's communication environment.



We are currently in the midst of a shift in the marketplace where the culture and conversation around conventional food is changing as consumers navigate which foods to adopt, moderate or abandon. But who influences those decisions?

While there are others, the research shows that **Peak Performers<sup>SM</sup>** are one group driving change - helping to set trends and significantly influencing **Providers<sup>SM</sup>** - a group that represents a third of the U.S. population.

**Providers<sup>SM</sup>** never feel quite good enough and the last thing they want is to be seen as a neglectful parent or to be caught snoozing when something new is known about the foods they buy for their family. When a food issue is placed before them they feel anxious that they don't have the

information or trusted sources they need to decide what's right or wrong. To ease the anxiety, they look to **Peak Performers<sup>SM</sup>** and other Consumer Types for guidance.

This influence is why more Americans are flocking toward various attributes of food that they consider evolved and that signify progress. We see that in the demand for food less processed, simpler labels and labels that indicate the product is "free from" everything from gluten to GMOs.

Contact CFI to learn about how certain Consumer Types drive change in today's food system.



# Put the Research to Work

## Pam the Provider and Processed Foods

From articles on her Facebook feed to parent conversations at the kids' soccer games, Pam the **Provider**<sup>SM</sup> feels increased pressure from certain influential Consumer Types to steer clear of processed foods and adopt a "clean eating" lifestyle.

Her angst is high as she often struggles to provide healthy meals for her family on a tight budget and overbooked schedule that lends itself to processed, easy-to-prepare and affordable foods that aren't considered particularly "clean" by the influencers whispering in her ear.

## Opportunity to Engage

The research illustrates an opportunity for the food system to be more engaged in the conversation about food and earn trust, particularly with the large segment of **Providers**<sup>SM</sup> who simply are looking for balanced information and validation that what they're buying and consuming is the responsible choice for themselves and their families.

### With all Consumer Types, we now can engage to:

- Help define what constitutes evolved food and lead the evolution
- Share with consumers the rewarding health and performance benefits of new ingredients, especially those ingredients that originate from non-American cultures
- Increase your share of voice in the digital discussion
- Establish and communicate the existing link between food and performance (this includes both body and mind), and become the go-to, trusted source of information on "good for you and your performance" food
- Showcase products that have evolved
- Reach the most influential segments through hypertargeting

We also can pinpoint conversation themes, where they're taking place and who's driving them - and engage with z in ways that are aligned with their values, beliefs and attitudes.

Comprehensive attributes for Consumer Types are available in the full 2016 research report.

## HOW CAN THE FOOD INDUSTRY USE THE IN-DEPTH 2016 CFI RESEARCH TO ENGAGE WITH PAM TO:



**SUPPORT AND EMPOWER HER**



**PROVIDE BALANCED INFORMATION**



**INSTILL CONFIDENCE ABOUT THE VALUE OF PROCESSED FOODS**



**AND EARN TRUST**

**... AS SHE MAKES CHOICES ABOUT WHAT SHE FEEDS HER FAMILY?**



CONTACT

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### Consumer Concerns About Life and Current Events

Respondents were given 19 life issues to rank and food issues clearly are top of mind. In fact, six of the nine most concerning life issues are food-system related.

Over the years, a majority of consumers have consistently expressed concerns in the survey about the rising cost of food and the affordability of food. For the third year, “Keeping Healthy Food Affordable” has been a top concern, pointing to the increased emphasis on the relationship between diet and health.

For the first time we included “Food is Actually What is Listed on the Label,” which fell in the top nine issues.

**CFI members have access to all research segmentation of Moms, Millennials, Foodies, Early Adopters and Consumer Types**

SIX OUT OF NINE MOST CONCERNING LIFE ISSUES ARE FOOD SYSTEM RELATED

### Top Sources and Topics

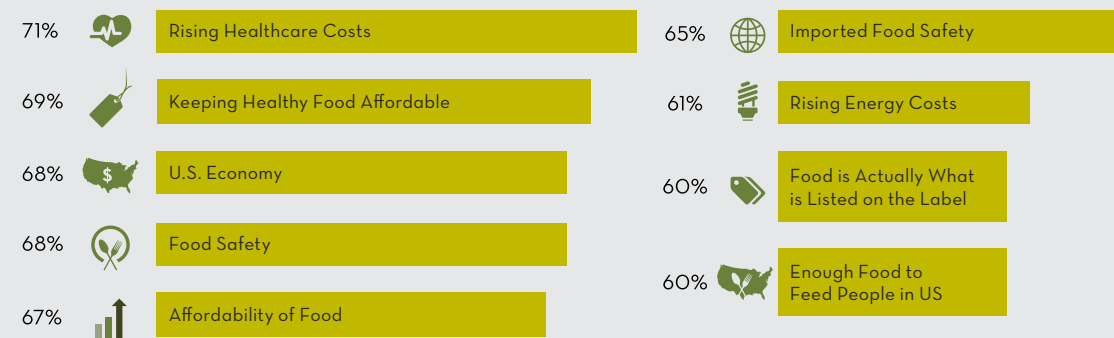
#### #1 Sources of Information About the Food System

It's no surprise that 17 percent of respondents ranked websites as their number one source for food system information. That figure increases to 27 percent when Google is factored in.

It's interesting to note that “Friends Not-Online,” also at 17 percent, speaks to the influence of peers. TV has plummeted since 2008, when it was ranked as the number one source of food system information at 26 percent.

More consumers are crowdsourcing information – accessing information from many sources – particularly websites, and friends and family not-online. They then synthesize that information with their values and beliefs to form opinions. A strong, focused and sustained online strategy is the best way to engage.

### About TWO out of THREE express concern for:



### About HALF express concern for...

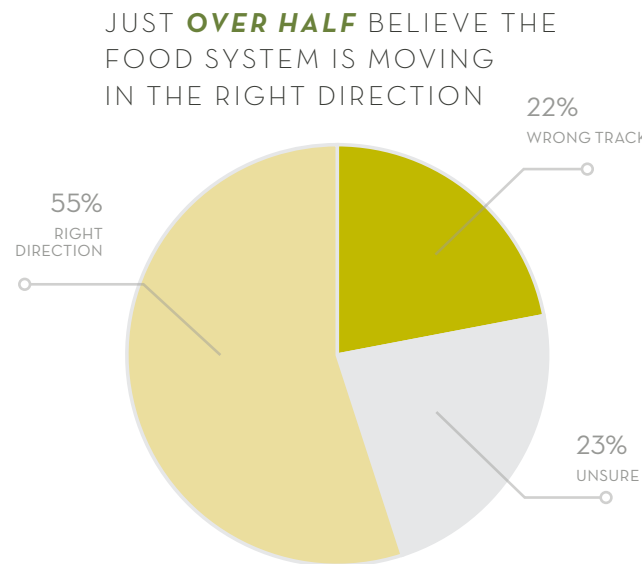
- Unemployment (59%)
- The Global Economy (59%)
- Personal Financial Situation (58%)
- Humane Treatment of Farm Animals (58%)
- Environmental Sustainability (55%)
- Access to Accurate Info to Make Healthy Food Choices (55%)
- Global Warming/Climate Change (55%)
- Obesity in America (54%)
- Childhood Obesity (53%)
- Treatment of Farm Laborers (51%)

### INFO SOURCES ABOUT THE FOOD SYSTEM RANKED NUMBER 1



### Is the Food System Headed in the Right Direction or Down the Wrong Track?

Survey results show a fairly significant upward trend in the number of consumers who feel the food system is headed in the right direction – 55 percent this year, compared to 40 percent in 2015.



CFI's Best Food Facts is one source where consumers can find third-party, credible information about food. We've enlisted the help of more than 200 food system experts, including university researchers, registered dietitians and farmers, to answer question from consumers who crave balanced information. Contact CFI to learn more about how Best Food Facts can help address food system issues of interest to you.

## IMPACT OF FOOD ON HEALTH AND FOOD SAFETY ARE TOPICS **MOST COMMONLY SEARCHED**

Search Engines Like Google or Bing are the Most Common Starting Place

40% believe they have access to information about where food comes from, how it's produced and its safety - up from 17% in 2008.



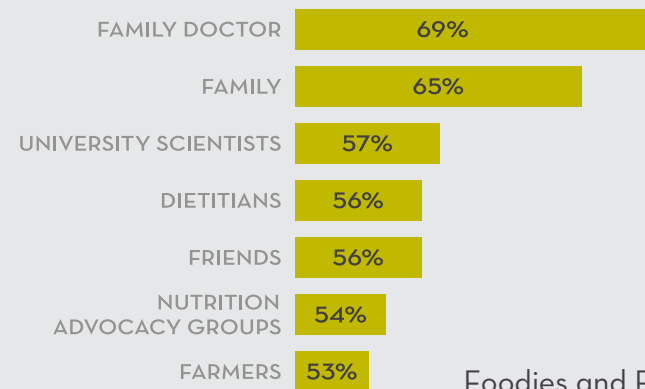
### Two Topics Consumers Search Most

Consumers search Impact of Food on Health and Food Safety most and 62 percent are using search engines.

Forty percent of consumers surveyed believe they have access to all of the information they need about where food comes from, how it's produced and its safety. That's up from just 17 percent in 2008. It's a significant and meaningful shift. Consumers feel more empowered, particularly online, and believe they have been given the tools to feel a better sense of control about where they're going and how they access information.

### Trusted Sources About Food-Related Issues

We provided survey respondents a list of 15 sources for food-related issues and asked them to rate their level of trust on each source independently. Family Doctor and Family came in first and second, respectively. Not far behind and with very similar ratings, University Scientists, Dietitians, Friends, Nutrition



FAMILY DOCTORS AND FAMILY MEMBERS ARE **MOST TRUSTED SOURCES** ABOUT FOOD-RELATED ISSUES

Foodies and Earlier Adopters are More Likely to Trust All Sources

Advocacy Groups and Farmers round out the top seven. Blogger and author Vani Hari, the "Food Babe," ranked third to last. Dr. Oz came in last. Food Companies and Manufacturers were sandwiched in between, demonstrating that there's work to do when it comes to earning trust.

Consumers access sources in different ways. Clearly, with Family Doctor and Family, most conversations are taking place in person, whereas accessing information from other sources, like University Scientists and Farmers, is most likely taking place online.

### The Disconnect: Trust and Responsibility

The research reveals a disconnect between certain sources consumers trust and those they hold responsible when it comes to ensuring good nutrition. If consumers both trust you and hold you responsible, like Family and Family Doctor, you're in great shape. If they trust a source that they also hold responsible, consumers are more comfortable and more trusting with information from that source.

#### TRUST TO ENSURE GOOD NUTRITION

Family Doctor  
Family  
Dietitians  
Nutrition Advocacy Groups  
University Scientists  
Farmers  
State Regulatory Agencies  
Grocery Stores  
Restaurants  
Food Companies



#### HOLD RESPONSIBLE TO ENSURE GOOD NUTRITION

State Regulatory Agencies  
Family  
Food Companies  
Farmers  
Family Doctor  
Nutrition Advocacy Groups  
Grocery Stores  
Dietitians  
University Scientists  
Restaurants

But if they hold you responsible and don't trust you, there's discontent that may cause consumers to take action, whether that's simply rejecting your information or products, or taking action to advocate for third-party oversight, new policies, regulations or laws to ensure you're behaving in a trustworthy manner.

It's clear that Food Companies, which rank third in responsibility and last in trust, have work to do. State Regulatory Agencies, which rank first in responsibility and seventh in trust, have a gap to bridge as well. There's only a slight misalignment with Farmers, who rank fourth in responsibility and sixth in trust. Keep in mind that addressing this chasm includes understanding the key Consumer Types and their motivations when it comes to trust.



### Attitudes About Agriculture

This year we asked respondents about their overall impression of agriculture and their knowledge about farming.

The results show a very positive (25 percent) or somewhat positive (43 percent) view of agriculture.

A majority (56 percent) say they know a little

about farming and there's a very strong desire (80 percent) to learn more about how food is produced and where it comes from.

This high level of interest in learning more about farming represents an opportunity for agriculture to engage to earn trust, particularly in an environment where consumers feel more empowered than ever before to access information.



## Overall Impressions of Agriculture and Knowledge of Farming

### Overall Impression

Very Positive **(25%)**  
Somewhat Positive **(43%)**

**More Positive Among** Foodies and Earlier Adopters

### Knowledge of Farming

Know a lot **(19%)**  
Know a little **(56%)**

**More Knowledge Among** Foodies and Earlier Adopters

### Interest in Knowing More

Yes **(80%)**

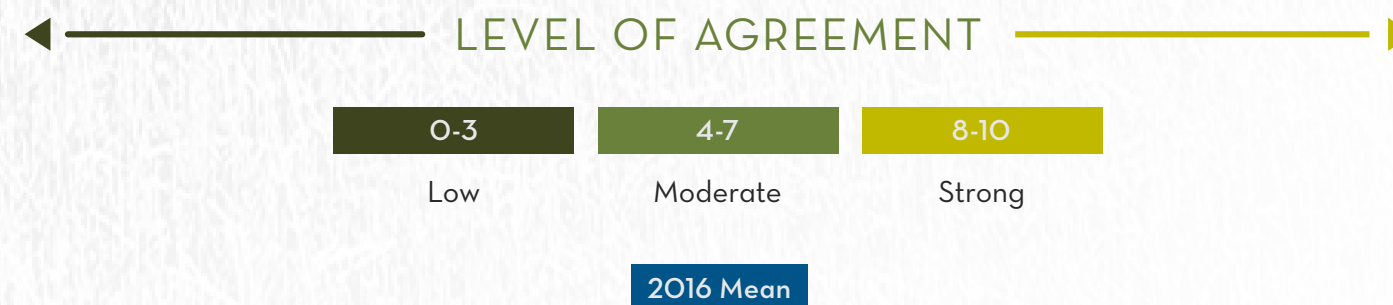
**Higher Among** Foodies and Earlier Adopters

### Tracking Consumer Attitudes Over Time

CFI's research benchmarks consumer attitudes on food system issues over the years. In some cases, trend movement can be traced back to 2007. Survey participants rate their level of agreement with statements on a 0-to-10 scale with 0-3 reflecting low level of agreement, 4-7 moderate and 8-10 strong.

CFI members have access to more than 30 statements reflecting consumer attitudes toward food affordability and safety, farm animal welfare, sustainability, GMOs, antibiotics and more. Here is a sample of 2016 results.

*Percentages may total more than 100% as graphs contain whole percentages that are rounded.*



*The vertical axis of each trend line graph represents one point above the highest year and one point below the lowest year.*

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

This is one of the few statements on which a downward trend on level of agreement was seen.

In terms of strong agreement with the statement, consumer sentiment has remained relatively consistent since 2008.



*“I am confident in the safety of the food I eat.”*

Nearly half strongly agree, a big jump from the 35 percent seen in 2015. Looking back to 2007 when consumer sentiment on this statement was first measured, the trend line has been quite positive.



*“I trust food produced in the U.S. more than I trust food produced outside the U.S.”*

A significant majority (59 percent) strongly agree, up from 51 percent last year with a mean score of almost 7.5. It will be interesting to see how this statement tracks over time as people become increasingly aware of a wide variety of food-related issues in a globalized system.



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

This is the strongest level of agreement with this statement since it was first posed in 2007. Strong agreement rose 14 percent from 2015 to 2016. The mean score this year is almost 1.5 points higher than in 2008.



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

As is the case with many of the statements this year, strong level of agreement (38 percent) is up considerably from 2015 (24 percent).



*“I have access to all of the information I want about where my food comes from, how it is produced and its safety.”*

We see a big increase in the level of strong agreement from last year (40 percent in 2016 and 28 percent in 2015) and a huge increase is seen since the statement was first measured in 2007. This is a good reflection of consumers feeling empowerment and control in their ability to have access to information about their food.



# THANK YOU TO OUR SPONSORS

Thank you to the sponsors who fund CFI’s annual consumer trust research through the Foundation for Food Integrity, a non-profit foundation created to conduct research and provide educational outreach about today’s food system.

## CFI Members

2016 CFI members contributed to the study through allocation of dues

## National Sponsors

- American Farm Bureau Federation
- Dairy Management Inc.
- United Soybean Board

## State Sponsors

- Indiana Soybean Alliance
- Maryland Soybean Board
- Michigan Soybean Promotion Committee

## Other Sponsors

- Council for Biotechnology Information
- Syngenta

THE CENTER FOR FOOD INTEGRITY HAS **EXCITING NEWS**

## WE NOW OFFER OUR ENGAGE TRAINING ONLINE!

Engage Online™ is a series of five, self-paced training modules with valuable learning exercises designed to provide a better understanding of today’s consumer. Engage Online™ will empower and equip participants with the skills to approach conversations in a whole new way and with confidence.

ARE YOU READY TO GET STARTED?

CONTACT DONNA MOENNING  
 DONNA.MOENNING@FOODINTEGRITY.ORG  
 816-556-3169





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