



Consumer Trust in the Food System

Summary Slides

October 2010

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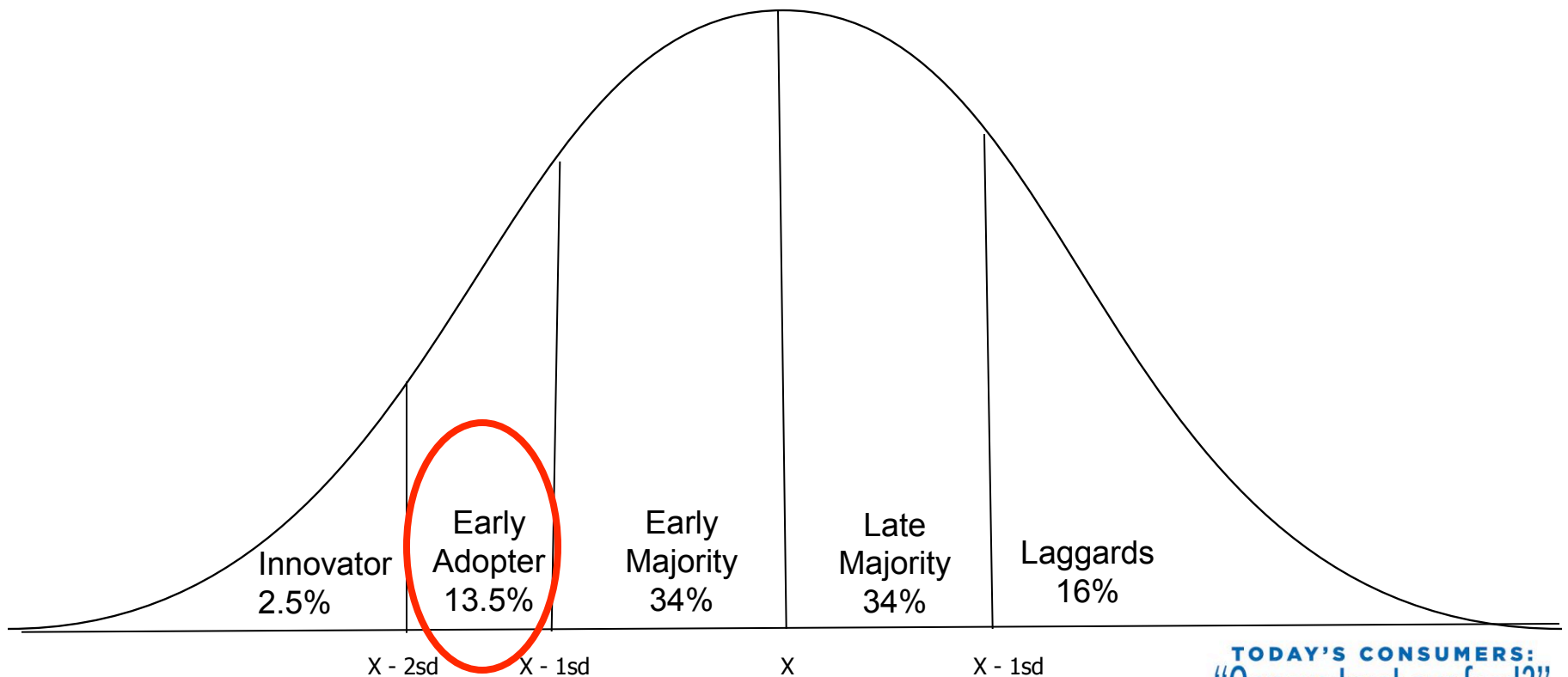
Keeping the Cows
In Wisconsin

TODAY'S CONSUMERS:
"Can we trust our food?"

Adopter Segments



Past research has shown that the Adopter Segments are normally distributed in a social system/market (bell curve)



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Building Trust in Food System Practices Among Early Adopters



Early Adopters...

- Are opinion leaders
- Can influence others
- Gate-keepers
- Drive social change
- Seek educational information - Web sites and topic-specific TV programs/networks
- Significantly more likely to believe and be impacted by educational food system information, than Laggards

Quantitative Methodology and Sample Design



- Respondents were recruited to participate in the study through Survey Sampling International's consumer Web panel
- Total of 2002 completed surveys (sampling error at 95% confidence level +/- 2.2%)
- The Web surveys averaged 30 minutes and data collection took place in August 2010. Split sample to accommodate the survey content
- T-tests and z-tests used to determine significant differences
- State-specific results for Iowa, Wisconsin, California, Indiana, Pennsylvania, Minnesota, and North Carolina

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
- **Highest concerns included** (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 Concern** (based on mean scores):
 - Global Warming (6.00)
 - Having Enough Food to Feed People in Developing Countries (5.59)

Summary of Concerns About Issues (Randomized)



Issue	Mean	% Very Concerned
The U.S. Economy	8.07	70%
Rising Health Care Costs	7.98	68%
Unemployment in the U.S.	7.94	67%
Rising Energy Costs	7.76	64%
Personal Financial Situation	7.71	64%
Rising Cost of Food	7.70	63%
Food Safety	7.37	56%
Safety of Food Imported from Outside the U.S.	7.36	57%
Impact of Oil Spill in the Gulf	7.23	56%
Global Economy	7.08	52%
Global Warming	6.00	40%

Summary of Concerns About Issues (cont'd)



Issue	Mean	% Very Concerned
U.S. Military Involvement in Iraq/Afghanistan	7.02	52%
Having Enough Food to Feed People in U.S.	6.92	50%
Humane Treatment of Farm Animals	6.52	43%
Access to Accurate Information to Make Healthy Food Choices	6.39	41%
Obesity in America	6.38	41%
Global Warming	6.00	40%
Having Enough Food to Feed People in Developing Countries	5.59	31%

Mean Summary of Concerns About Issues by Innovator Segment



Issues	Total	Innovator	Early Adopter	Early Majority	Late Majority	Laggard
The U.S. Economy	8.07	8.14	8.57	8.10	8.00	5.63
Rising Health Care Costs	7.98	7.91	8.43	8.03	8.00	5.42
Unemployment in the U.S.	7.94	7.95	8.46	7.96	7.91	5.27
Rising Energy Costs	7.76	8.22	8.25	7.82	7.58	5.19
Personal Financial Situation	7.71	7.71	7.81	7.74	7.67	5.88
Rising Cost of Food	7.70	8.12	8.27	7.60	7.52	5.20
Food Safety	7.37	7.65	8.24	7.57	6.83	4.77
The Safety of Food Imported from Outside the U.S.	7.36	7.53	8.20	7.55	6.89	4.64
Impact of Oil Spill in the Gulf	7.23	7.19	7.98	7.42	6.85	4.73

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Mean Summary of Concerns About Issues by Innovator Segment



Issues	Total	Innovator	Early Adopter	Early Majority	Late Majority	Laggard
The Global Economy	7.08	7.20	7.72	7.10	6.86	4.63
U.S. Military Involvement in Iraq and Afghanistan	7.02	6.97	7.75	7.24	6.56	5.00
Having Enough Food to Feed People in the U.S.	6.92	7.28	7.60	7.02	6.51	4.63
Humane Treatment of Farm Animals	6.52	6.88	7.32	6.72	5.93	4.33
Access to Accurate Information to Make Healthy Food Choices	6.39	6.61	7.45	6.60	5.58	4.15
Obesity in America	6.38	6.25	7.24	6.78	5.73	4.46
Global Warming	6.00	6.26	6.87	6.14	5.37	3.98
Having Enough Food to Feed People in Developing Countries	5.59	5.64 ^{EF}	6.37 ^{BEF}	6.14 ^{bEF}	4.85 ^F	3.78

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Change in Attitudes Toward Food Safety After Educational Information



Attitudinal Statements	Mean Ratings Before (A)	Mean Ratings After (B)
(n=1000)		
I trust food produced in the U.S. more than I trust food produced outside the U.S.	6.84	6.94
I am confident in the safety of food I eat	6.21	6.42 ^a
I am as confident in the safety of food I eat as I was a year ago	6.15	6.28
Food safety is the number one priority of the U.S. meat industry	5.94	6.11
Food safety is the number one priority of the restaurant industry	5.92	6.06
Food safety is the number one priority of the produce industry	5.90	6.07
Food safety is the number one priority of the retail grocery industry	5.88	6.10 ^a

Upper case letters indicate significance at the 95% level.
Lower case letters indicate significance at the 90% level.

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Change in Attitudes Toward Food Safety After Educational Information



Attitudinal Statements	Mean Ratings Before (A)	Mean Ratings After (B)
(n=1000)		
Food safety is the number one priority of the U.S. poultry industry	5.77	6.06 ^A
The FDA oversees dairy production by regularly inspecting all dairy farms	5.57	6.09 ^A
Government food safety agencies are doing a good job ensuring the safety of the food we eat	5.47	6.03 ^A
The FDA strictly regulates the use of antibiotics given to animals raised for food	5.25	6.05 ^A
I don't care where my food was produced as long as it is affordable, safe and wholesome	5.09	5.31
Today's food supply is safer than it was when I was growing up	5.09	5.74 ^A
I have access to all of the information I want about where my food comes from, how it was produced and its safety	5.06	5.69 ^A

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Change in Attitudes Toward the Humane Treatment of Farm Animals as a Result of Educational Information



Attitudinal Statements	Mean Ratings Before (A)	Mean Ratings After (B)
(n=1000)		
If farm animals are treated decently and humanely, I have no problem consuming meat, milk and eggs	7.17	7.29
I would support a law in my state to ensure the humane treatment of farm animals	7.04	7.22
The U.S. Meat Industry is subject to a federal law detailing the ways in which livestock must be handled and processed in plants to ensure humane treatment	6.48	6.62
A lack of federal oversight of the U.S. Meat Industry makes livestock abuse common	6.30	6.31
Raising animals indoors protects them from predators	6.17	6.81 ^A
Raising animals indoors protects them from weather extremes	6.14	6.83 ^A
Farm animals that are raised for food should be treated the same way household pet owners treat their pets	5.82	6.03
Most pigs, turkeys and chickens are raised indoors	5.62	6.79 ^A
U.S. meat is derived from humanely treated animals	5.47	5.89 ^A
Raising animals indoors is beneficial to the animal	5.02	6.08 ^A

Change in Attitudes Toward Nutrition as a Result of Educational Information



Attitudinal Statements	Mean Ratings Before (A)	Mean Ratings After (B)
(n=1002)		
Eating a balanced diet which includes a variety of foods including meat, vegetables and dairy is a sound strategy for good nutrition	7.89	7.81
Increasing production and availability of affordable food is a critical need today	6.89	7.12 ^a
Children who don't have enough of the right food suffer worse health and achieve less as adults	6.88	7.09 ^a
Americans today are eating more meat and poultry; more than the 5 to 7 ounces recommended for adults each day	6.54	6.67
Hormone use in dairy milk production is a health concern	6.45	6.41
If farmers are limited in the way they can grow food, it will have a negative impact on our healthy food choices	6.33	6.49

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Change in Attitudes Toward Nutrition as a Result of Educational Information



Attitudinal Statements	Mean Ratings Before (A)	Mean Ratings After (B)
(n=1002)		
If farmers are limited in the way they can grow food, it will have a negative impact on our healthy food choices	6.33	6.49
Malnutrition and obesity, symptoms of not having enough food or the right food, trap children in an intergenerational cycle of ill health and poverty	6.30	6.74 ^A
Eating too much red meat can increase the risk of heart disease because it contains saturated fat	6.24 ^B	5.76
Grocery stores are addressing obesity in the U.S. by offering more products with reduced fat, sodium and sugar	6.03	6.74 ^A
Food processing includes fortification which makes it possible for both children and adults to achieve the daily recommendations of essential vitamins and minerals, helping them stay healthy and strong	5.85	6.59 ^A
Food grown organically is more healthful than conventionally grown food	5.85	5.73

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Change in Attitudes Toward the Responsible Use of Technology and Innovation for Food Production as a Result of Educational Information



Attitudinal Statements	Mean Ratings Before (A)	Mean Ratings After (B)
(n=1002)		
World population is growing at a rapid rate	7.29	7.40
Food processing technology, including pasteurizing, fermenting, drying, freezing and canning helps ensure food is safe to eat	6.93	6.91
Advancements in farming technology have allowed U.S. farmers to increase productivity over the last 50 years	6.91	7.06
In the next 40 years we need to double the amount of food produced to meet the global demand for food	6.73	7.01 ^A
The majority of the additional food needed for a growing global population will need to come from advancements in farming technology	6.59	6.98 ^A
The next 40 years we need to double the amount of food produced on the same amount of land to protect the environment and preserve our natural resources	6.43	6.92 ^A
Today's farms are more specialized which enables farms to become experts	6.23	6.54 ^A
Food packaging innovations such as single-serve bags, ready-to-eat foods and heat-and-eat foods provide convenience while keeping foods safer and fresher longer	6.22	6.62 ^A

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TODAY'S CONSUMERS:
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Change in Attitudes Toward the Responsible Use of Technology and Innovation for Food Production as a Result of Educational Information (Continued)



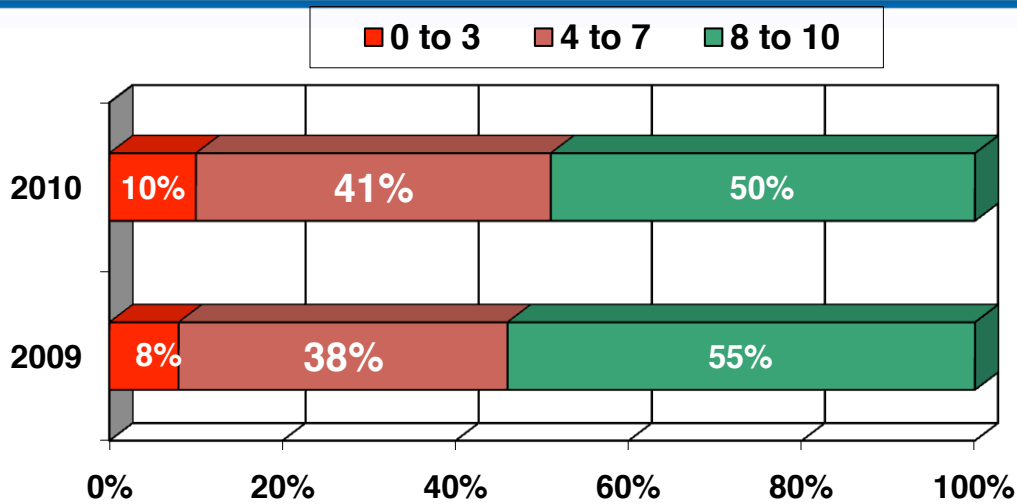
Attitudinal Statements	Mean Ratings Before (A)	Mean Ratings After (B)
(n=1002)		
Planting genetically modified corn and soybean seeds is a widespread farming practice in the U.S.	6.01	6.63 ^A
Using pesticides and herbicides helps farmers protect their crops from weeds and insects, which reduces the cost of production, increases yields and lowers food prices	5.91	6.31 ^A
Farmers receive training and certification from industry organizations to help them stay up-to-date with new ideas and practices	5.89	6.24 ^A
Planting genetically modified corn and soybean seeds is beneficial to the environment because it reduces the amount of pesticides and herbicides used	5.81	6.35 ^A
The FDA strictly regulates the use of antibiotics given to animals raised for food	5.75	5.95 ^a
The FDA strictly regulates the use of hormones in dairy cattle to increase milk production	5.73	5.91
More intensive farming methods are better for the environment	5.72	6.38 ^A
The use of herbicides and pesticides increases crop yields and crop quality, which means lower prices at the grocery store	5.65	6.25 ^A

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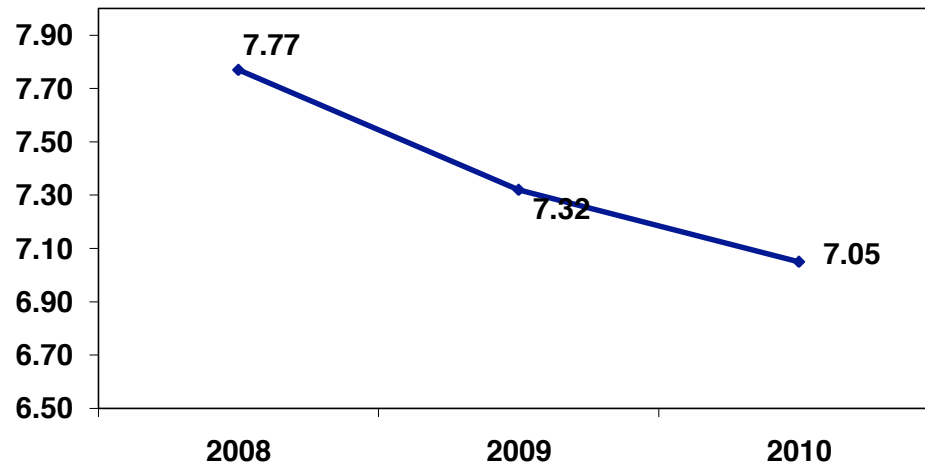
“Food prices are a greater concern to me now than they were a year ago.”



2010 Mean 7.05

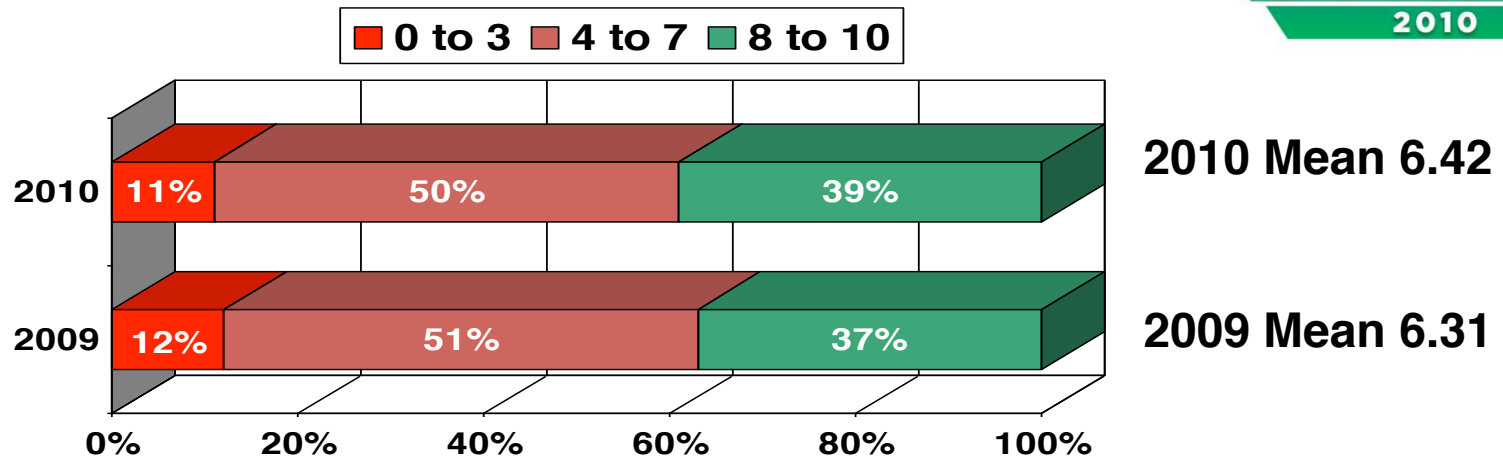
2009 Mean 7.32

Three Year Mean

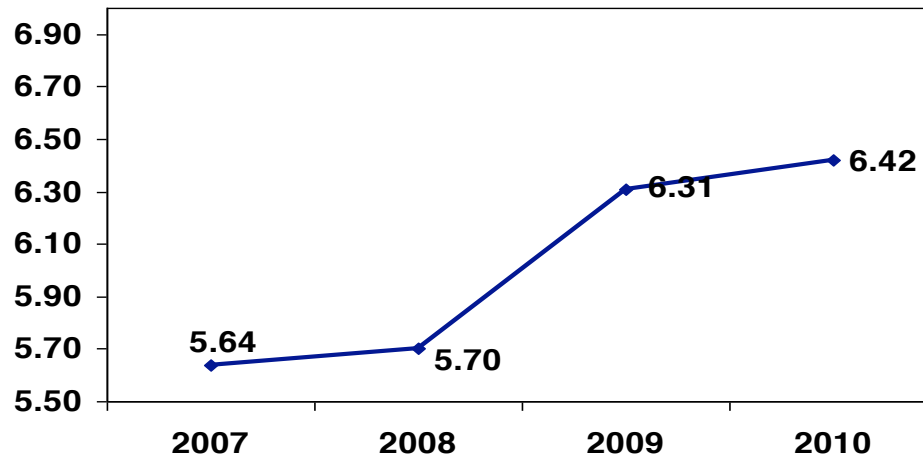


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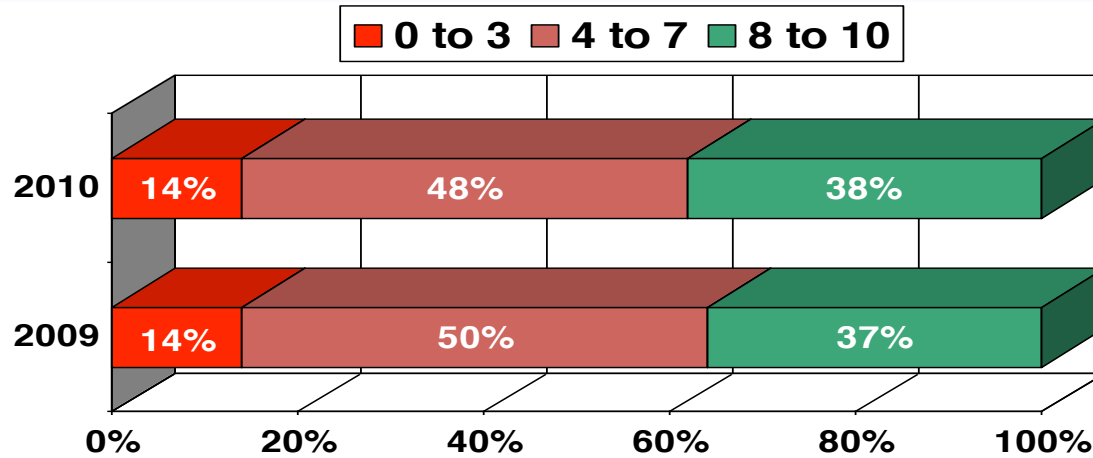
“I am confident in the safety of the food I eat.”



Four Year Mean



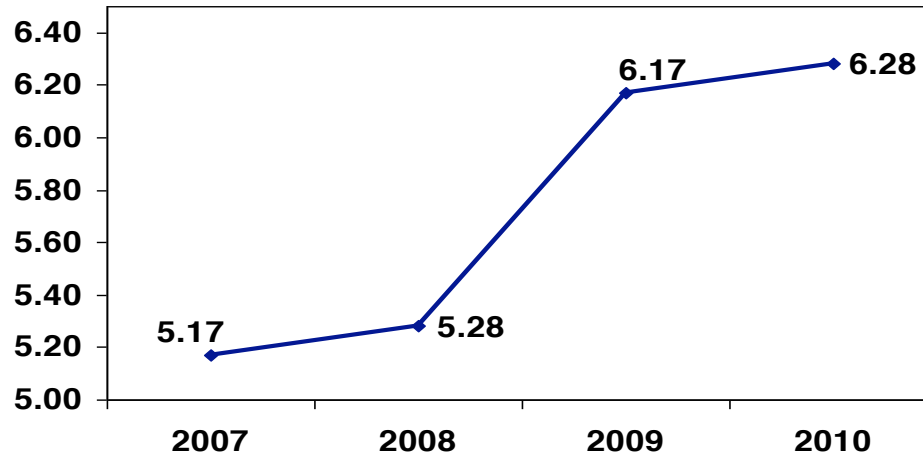
“I am as confident in the safety of the food I eat as I was a year ago.”



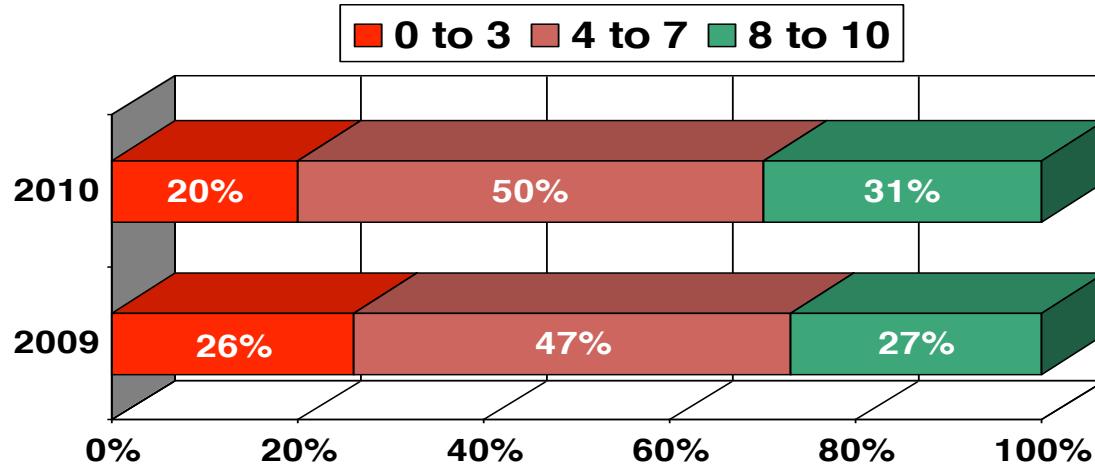
2010 Mean 6.28

2009 Mean 6.17

Four Year Mean

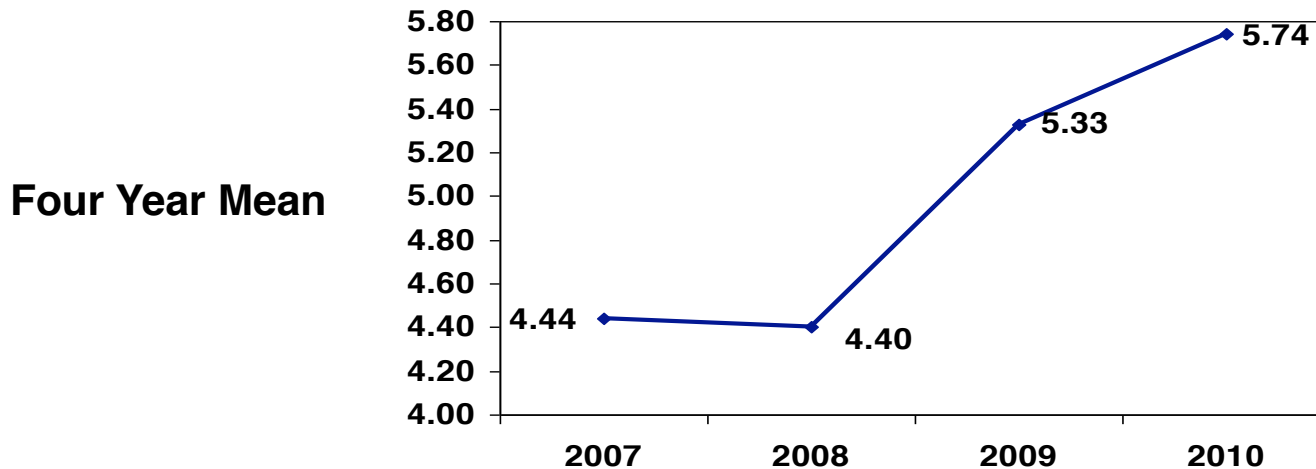


“Today’s food supply is safer than it was when I was growing up.”



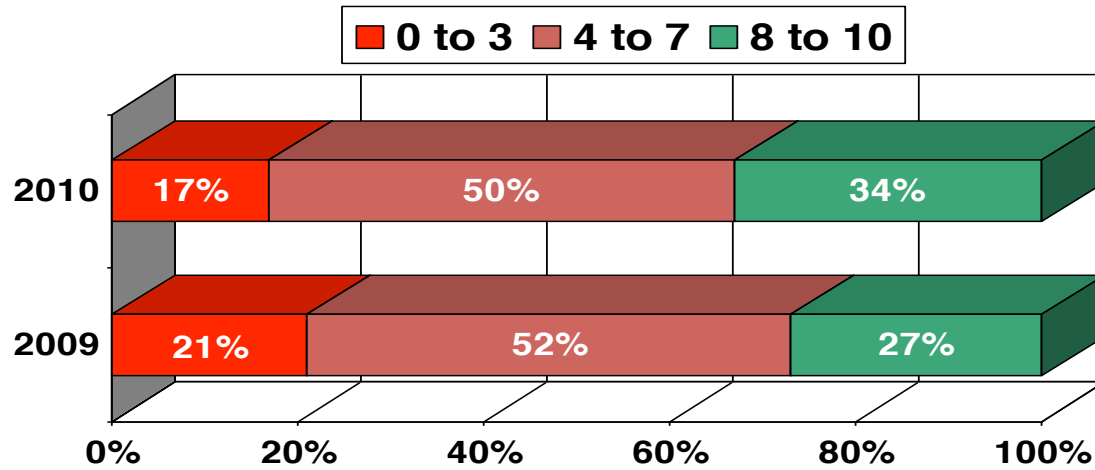
2010 Mean 5.74

2009 Mean 5.33



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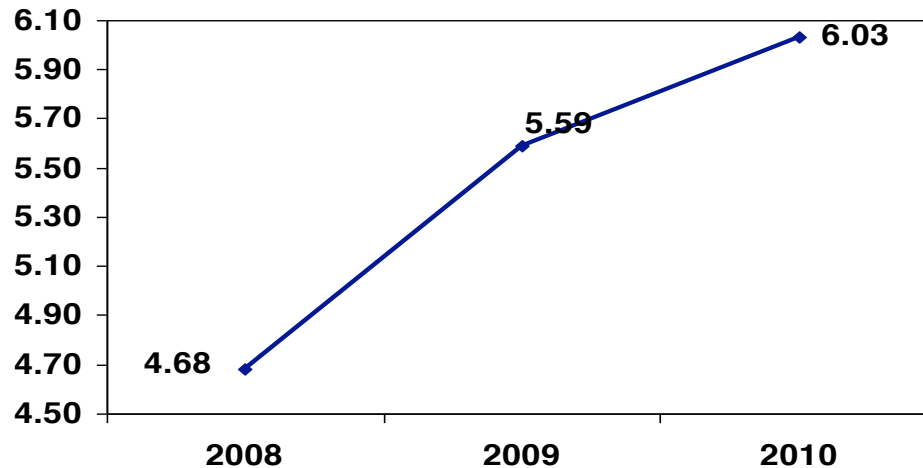
“Government food safety agencies are doing a good job ensuring the safety of the food we eat.”



2010 Mean 6.03

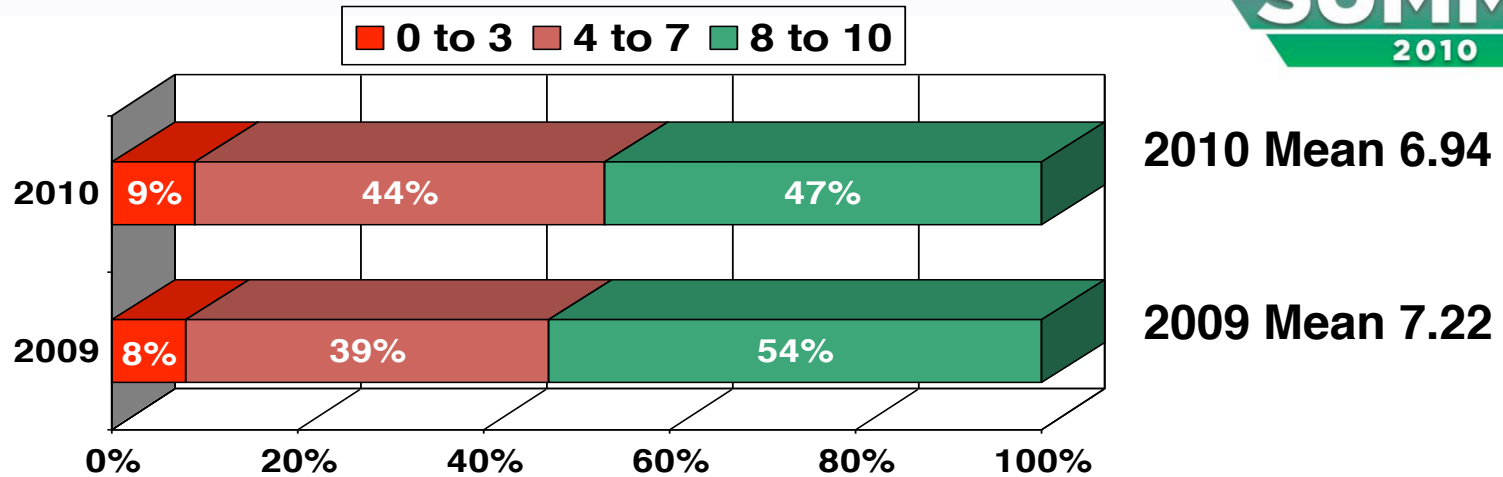
2009 Mean 5.59

Three Year Mean

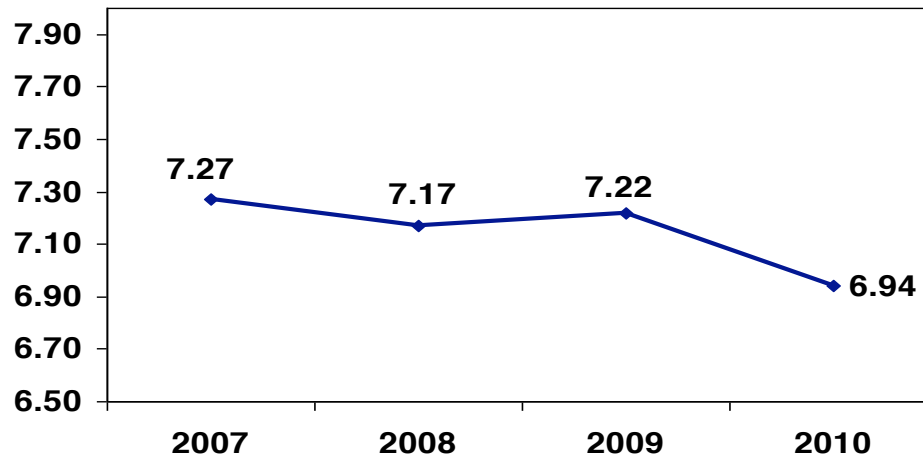


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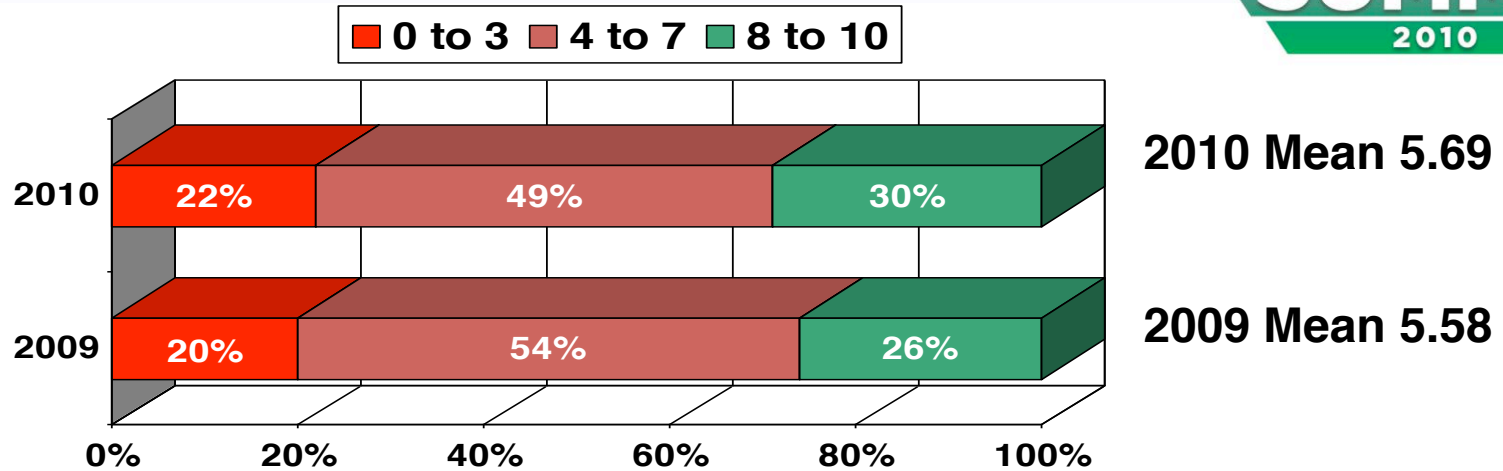
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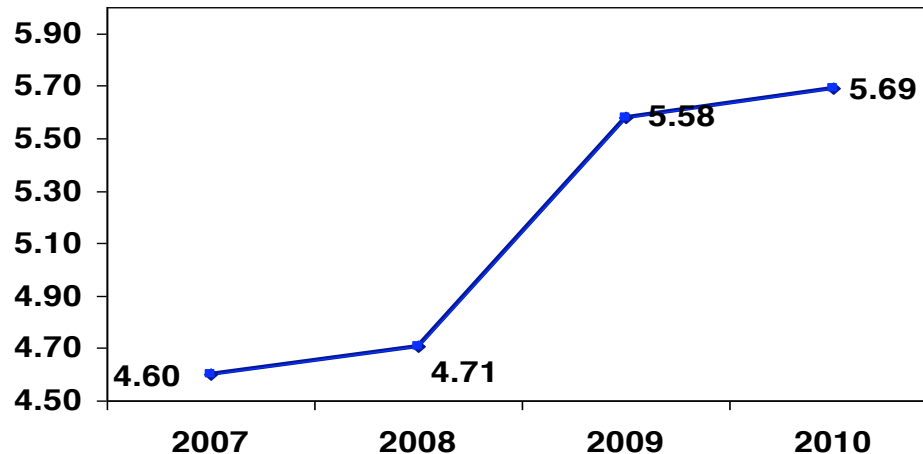
Four Year Mean



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

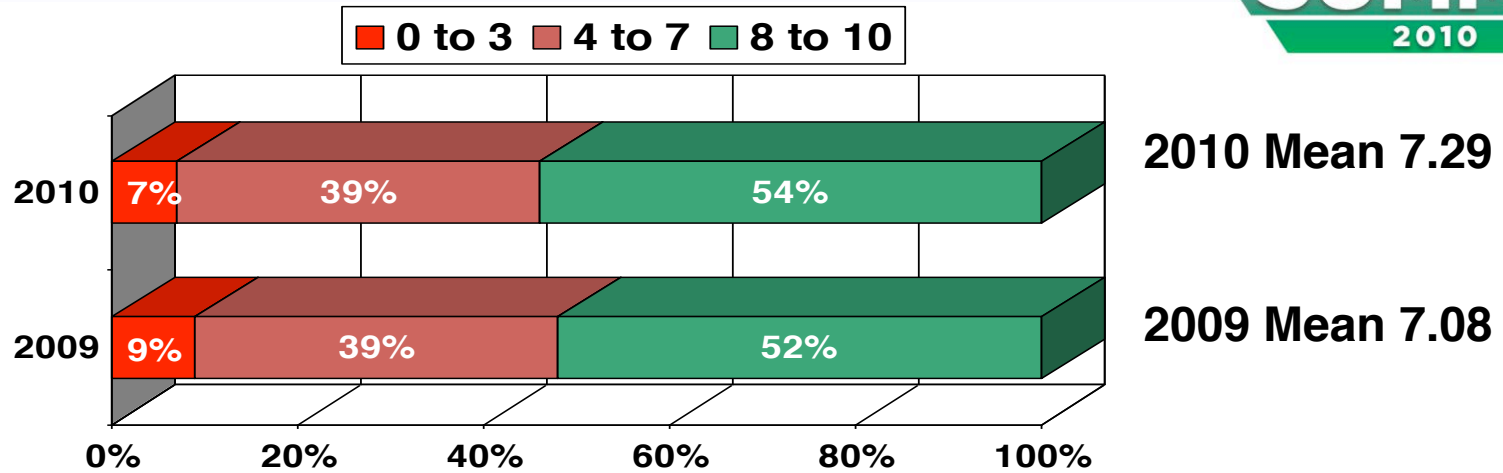


Four Year Mean

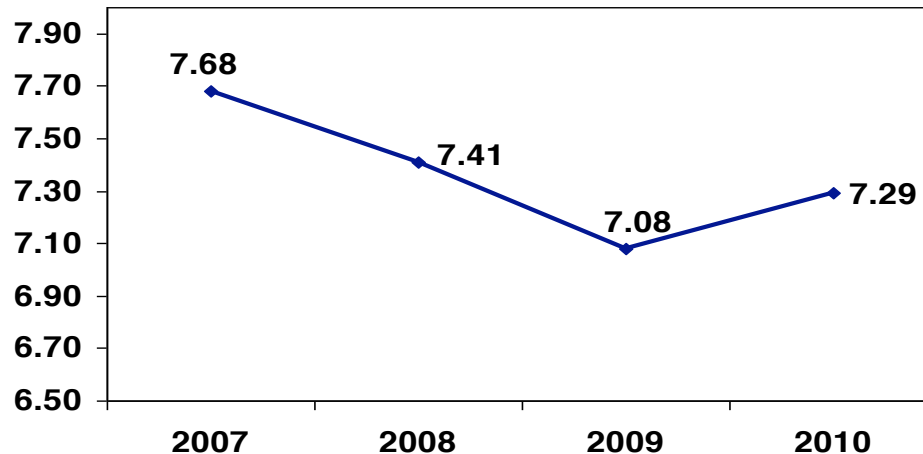


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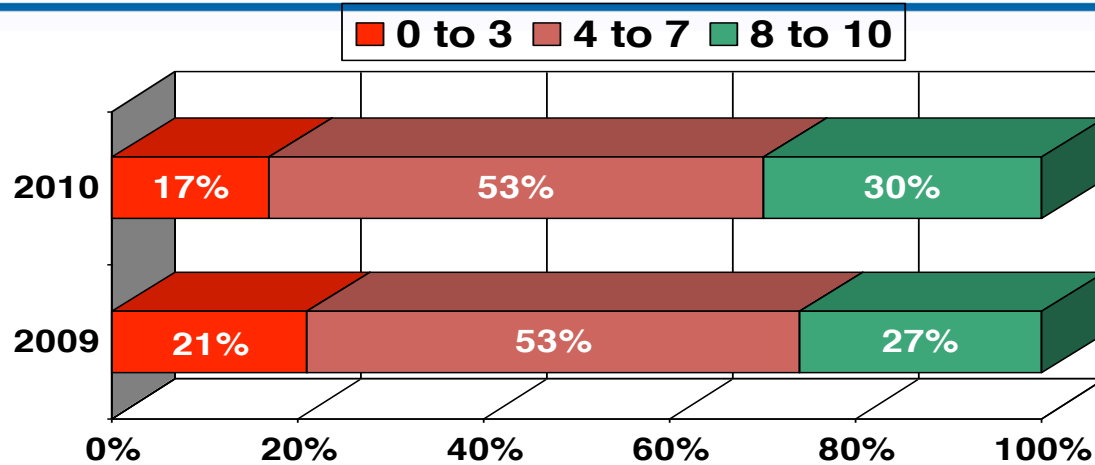
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Four Year Mean



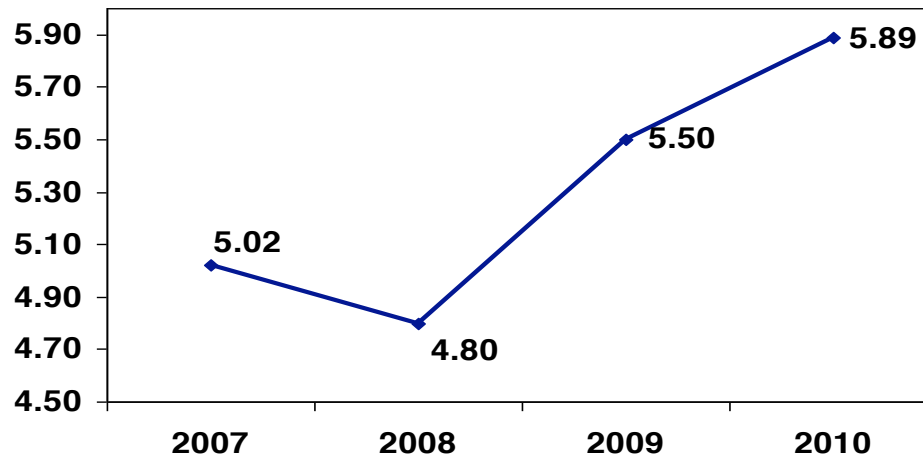
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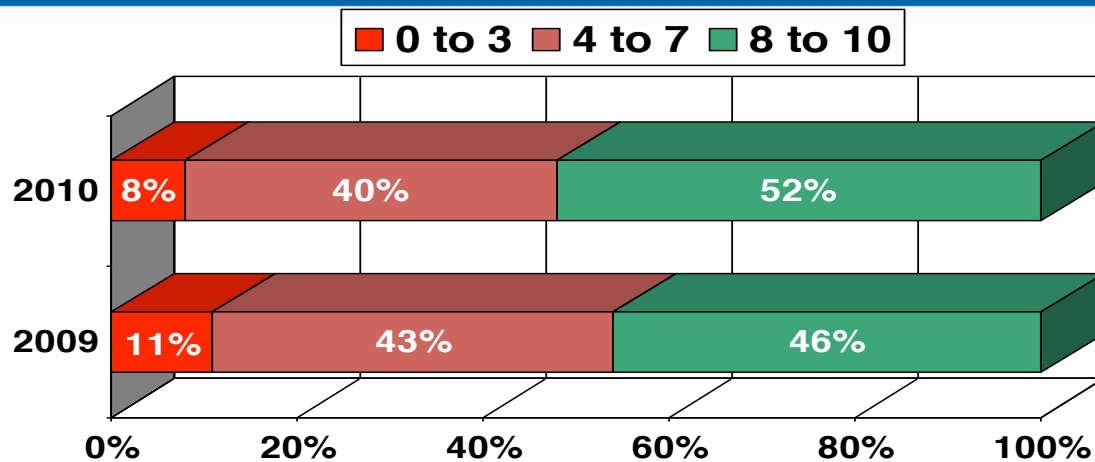
2010 Mean 5.89

2009 Mean 5.50

Four Year Mean



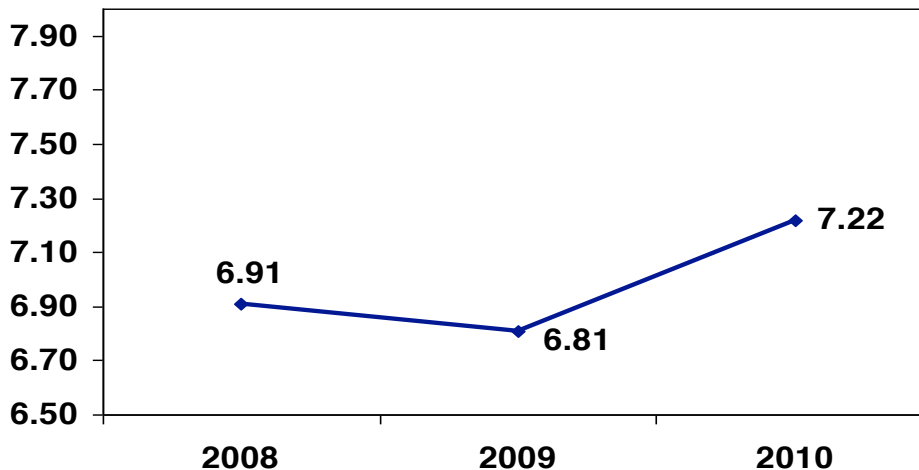
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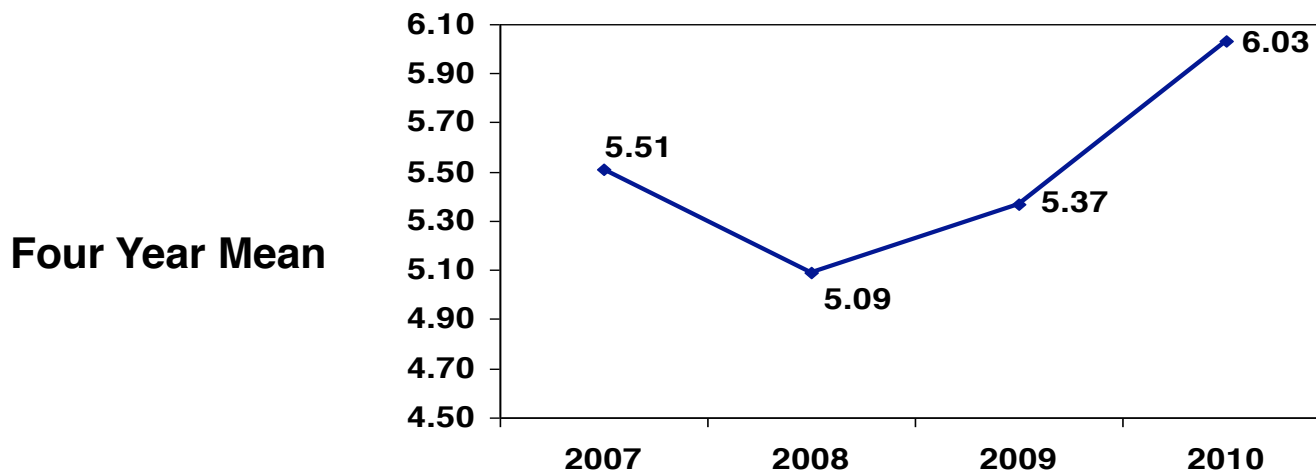
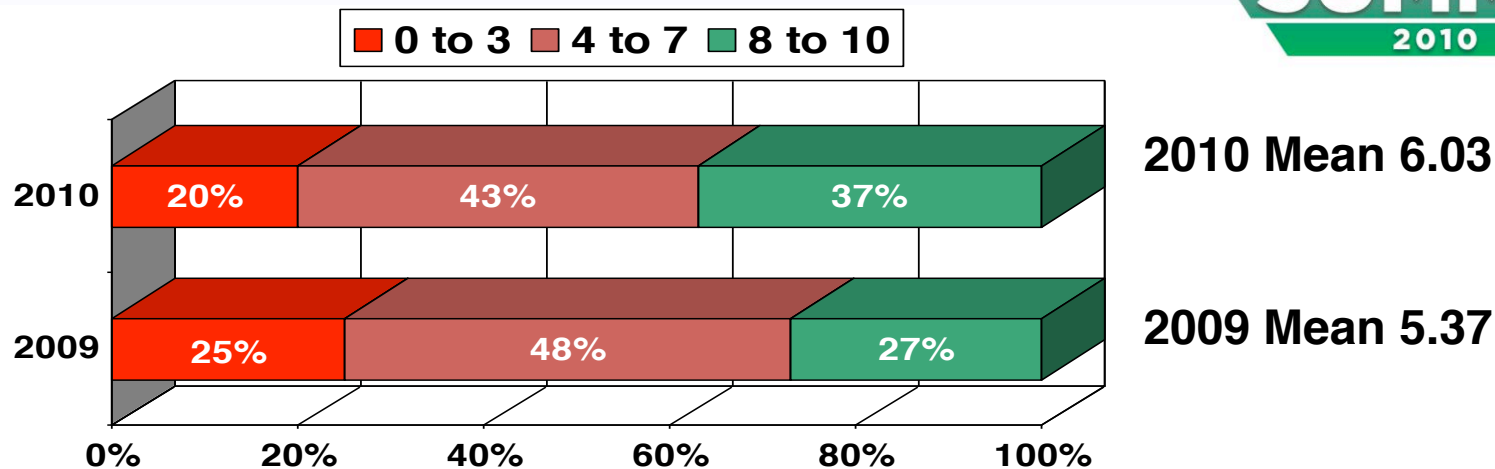
2010 Mean 7.22

2009 Mean 6.81

Three Year Mean



“Farm animals that are raised for food should be treated the same way household pet owners treat their pets.”



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