

# Consumer Confidence

## Building Trust in Your Products



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

Charlie Arnot

Charlie.Arnot@Foodintegrity.org

[www.foodintegrity.org](http://www.foodintegrity.org)

[www.bestfoodfacts.org](http://www.bestfoodfacts.org)

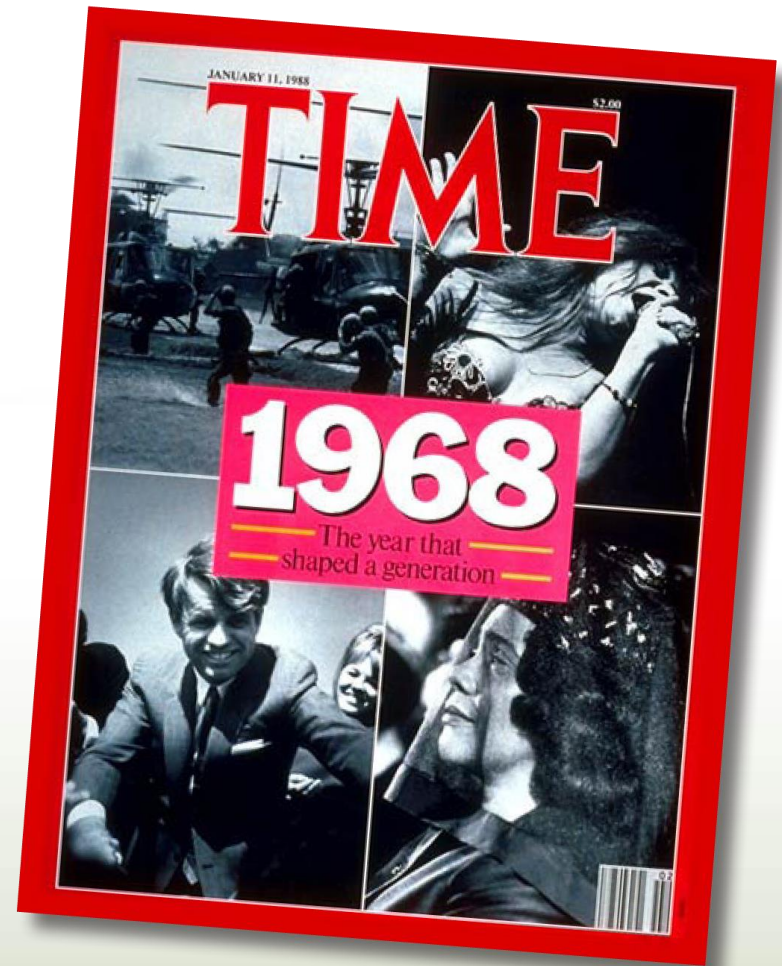
# Today's Food System

- Today food is generally:
  - Safer
  - More available
  - More affordable
- And yet consumers have more questions and are more skeptical than ever before
- How did that happen?



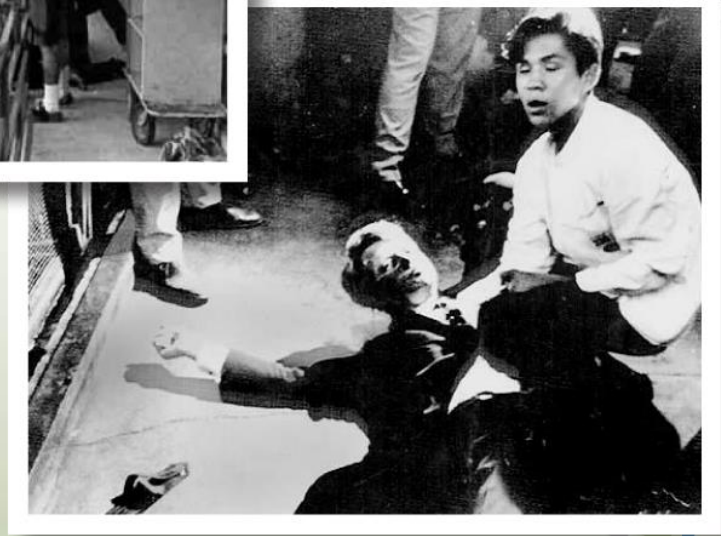
# 1968

THE YEAR THAT  
SHAPED A  
GENERATION.



THE CENTER FOR  
FOOD INTEGRITY™

# 1968 Events

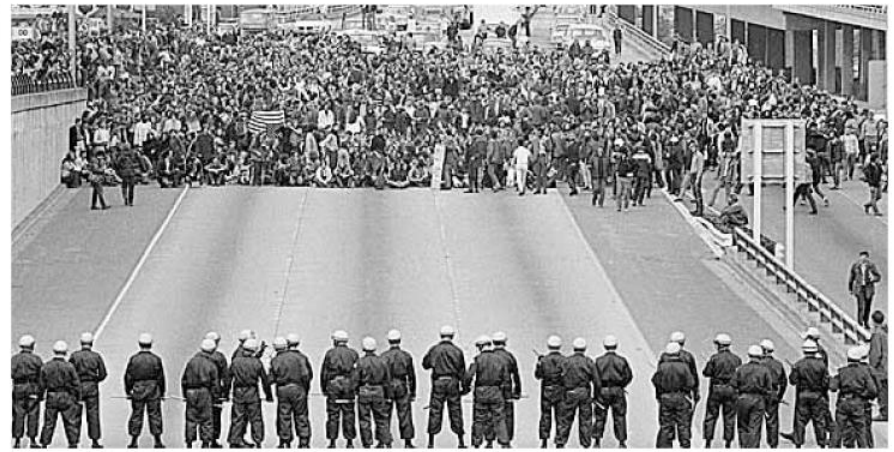




# 1968 Democratic Convention



# Vietnam



# Christmas Eve 1968

## Greetings from Lunar Orbit



THE CENTER FOR  
FOOD INTEGRITY™



# 1970 - Kent State



## 4 Students Killed in Demonstration

UI Boycott  
Schedu'd  
Wednesday

**By GARDY BOON**  
The student leaders of Kent State University, James Bevel and Charles J. Davis, called for a general strike today against President Nixon's policy of bombing Vietnam and Cambodia and a plan of demonstrating on the grounds of Kent State University, announced the National Student Reluctance to War Committee (NSRWC).  
Bevel and Davis said they would lead a demonstration at 10:30 a.m. Thursday on the grounds. They also said they will be in the lead of a demonstration on the grounds of Kent State University, Ohio, today. National Guardsmen fired into a crowd of demonstrators at the fourth day of protests on the campus. Four persons were killed, two were injured and one was hospitalized.  
The NSRWC said it would be a general strike and would be held for 24 hours. It said it would be a general strike and would be held for 24 hours. It said it would be a general strike and would be held for 24 hours.



'He's Dead!'

## The Daily Iowan

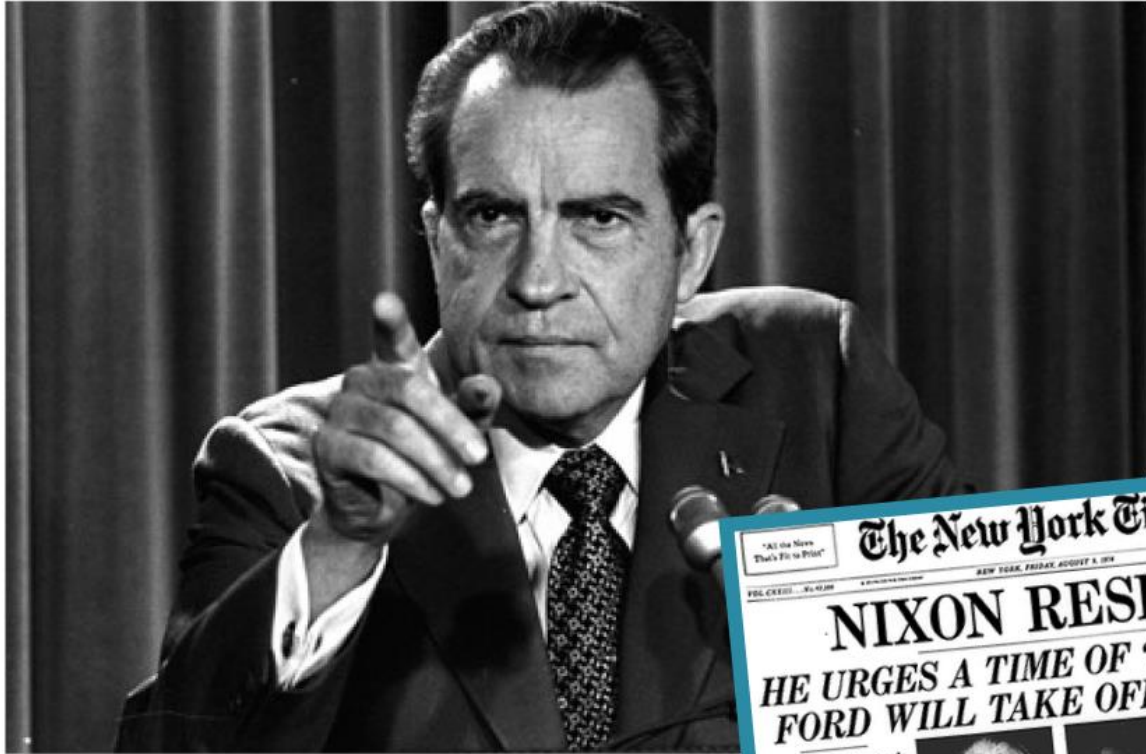
Serving the University of Iowa and the People of Iowa City

## National Guardsmen Fire on Kent State Protesters

KENT, Ohio (AP) — Four students in a crowd yelling National Guardsmen with rifles and smoke shot to death at Kent State University Monday when the group opened fire during an antiwar demonstration. Two of the dead were men, two were women.  
All four U.S. troops said they were firing automatically after a shouting slogan had died at Kent.  
Four other students were critically wounded and eight other students, including two guardsmen, were killed in the shooting. One of the guardsmen was killed by a returning shot.  
The crowd had the face of 600-700 people and was shouting and singing. The guardsmen fired at the crowd and shot into the crowd. The guardsmen fired at the crowd and shot into the crowd. The guardsmen fired at the crowd and shot into the crowd.  
The shooting came after a hour of 200 protesters, their anger at war got so bad that some threatened to storm the ROTC building. The troops had followed the demonstrators there a night on Kent State's Commons area after the National Student Reluctance to War Committee.  
Kent State University students were organizing a rally for the demonstration Monday night to protest the shooting. The shooting was the first time since the Vietnam War that a student has been killed by a National Guardsman.  
The guard remained in the area until 10:30 p.m. and then left. The guard remained in the area until 10:30 p.m. and then left. The guard remained in the area until 10:30 p.m. and then left.



# 1972 – Watergate Break-In



THE CENTER FOR  
FOOD INTEGRITY™

# '70s-'80s Events

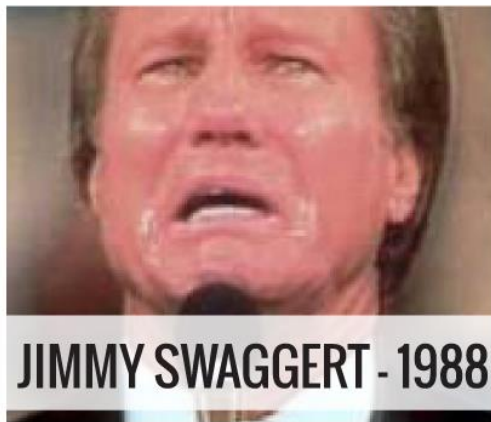


IRAN CONTRA - 1986

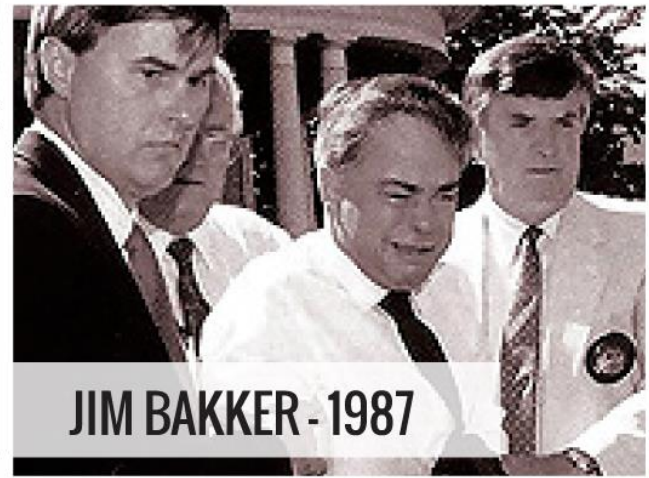
THREE MILE ISLAND - 1979



EXXON VALDEZ - 1989



JIMMY SWAGGERT - 1988



JIM BAKKER - 1987



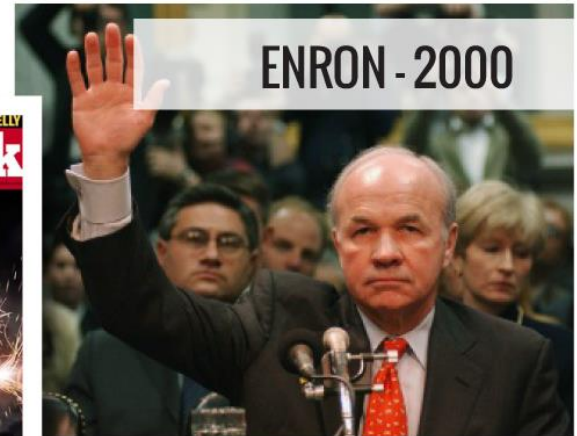
THE CENTER FOR  
FOOD INTEGRITY™



# '90s – 2000s Events



CLINTON SCANDAL - 1998



ENRON - 2000



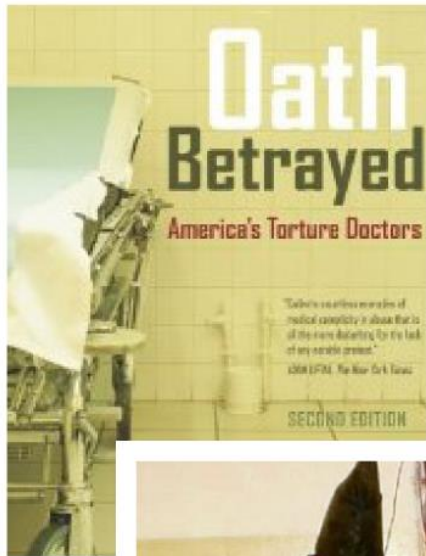
ARTHUR ANDERSEN - 2002



THE CENTER FOR  
FOOD INTEGRITY™



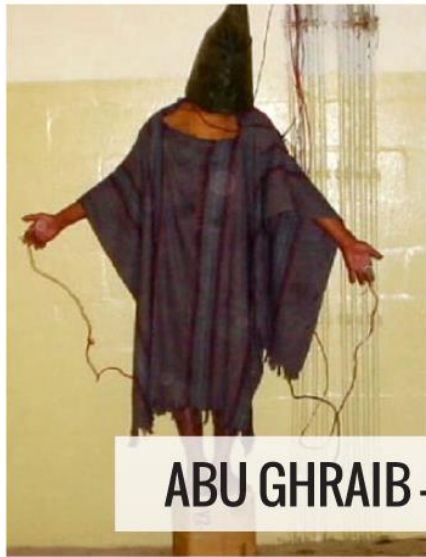
# 2000s - Events



JOHN EDWARDS - 2008



TIGER WOODS - 2009



ABU GHRAIB - 2004



ELIOT SPITZER - 2008



THE CENTER FOR  
FOOD INTEGRITY™

# Subprime Mortgage Crisis

## LEHMAN BROTHERS BANKRUPTCY - 2008



March 14, 2008 12:02 P.M. ET

## Bear Stearns bailout

*J.P. Morgan and N.Y. Fed provide funds to strapped Wall St. broker*

“ MORTGAGE FRAUD FLOURISHED IN AN ENVIRONMENT OF COLLAPSING LENDING STANDARDS AMID LAX REGULATION.  
- FINANCIAL CRISIS INQUIRY COMMISSION



THE CENTER FOR  
FOOD INTEGRITY



# 2000s – More Events



BP OIL SPILL - 2010

BP'S HAYWARD  
APOLOGIZES:  
"I'D LIKE MY  
LIFE BACK"



PENN STATE - 2011



# Food is personal...



*We need it for survival*



THE CENTER FOR  
FOOD INTEGRITY™

# Food is personal...



*We feed it to our children*



THE CENTER FOR  
FOOD INTEGRITY™



# Food is personal...



It's part of our culture/celebrations



THE CENTER FOR  
FOOD INTEGRITY



# Consolidation, Integration and Industrialization



**FOOD, INC.**



THE CENTER FOR  
FOOD INTEGRITY

# Significant Social Shifts

## THEN

- Authority is granted primarily by office
- Broad social consensus driven by WASP males
- Communication is formal, indirect (mass communication)
- Progress is inevitable
- Institutions are respected

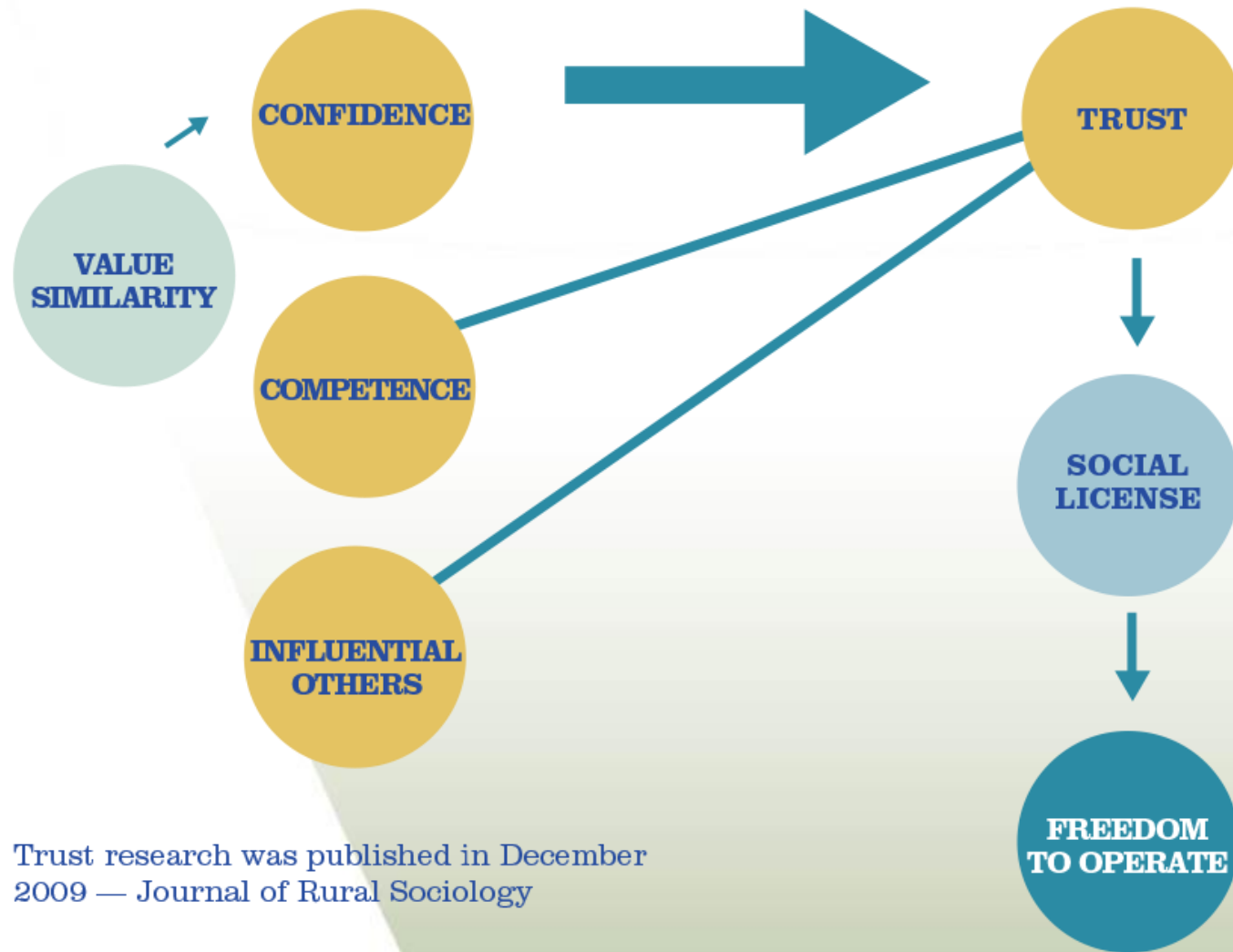
## NOW

- Authority is granted primarily by relationship
- No single social consensus, great diversity, many voices
- Communication is informal, direct (masses of communicators)
- Progress is possible
- Institutions are not trusted



THE CENTER FOR  
FOOD INTEGRITY™

# CFI Trust Model



Trust research was published in December 2009 — Journal of Rural Sociology



THE CENTER FOR  
FOOD INTEGRITY™



# 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.



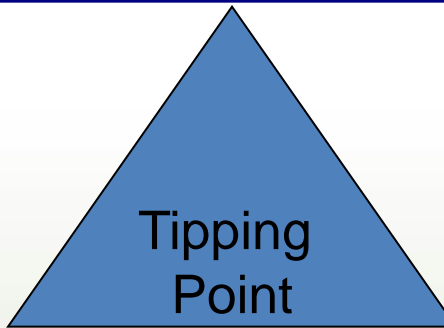
THE CENTER FOR  
FOOD INTEGRITY™

# The Social License To Operate

**Flexible  
Responsive  
Lower Cost**

## **Social License**

- Ethics
- Values
- Expectations
- Self regulation



Single triggering event  
Cumulative impact

**Rigid  
Bureaucratic  
Higher Cost**

## **Social Control**

- Regulation
- Legislation
- Litigation
- Compliance



THE CENTER FOR  
FOOD INTEGRITY™

# Growing Challenges: Obesity

**theguardian**  
Winner of the Pulitzer prize 2014

Sugar, not fat, exposed as deadly villain  
in obesity epidemic

University of California San Francisco

Sugar Is a Poison, Says UCSF Obesity Expert

The New York Times Magazine

**Is Sugar Toxic?**

**Documentary Exposes How  
Sugar and Our Food System Fuels  
Obesity**



Y<sup>SM</sup>



# Growing Challenge: Biotechnology

SCIENTIFIC AMERICAN  
**Why People Oppose GMOs Even Though Science Says They Are Safe**



OXFORD JOURNALS

**Genetically modified soybeans and food allergies**

The New York Times

*Modified Wheat Is Discovered in Oregon*



EatingWell  
WHERE GOOD TASTE MEETS GOOD HEALTH

THE BAD SEED: THE HEALTH RISKS OF GENETICALLY MODIFIED CORN

LIVESTRONG.COM

**What Grains Are Not GMO?**

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

# Growing Challenges: Public Health

AJC.com

Are meat and dairy as unhealthy as cigarettes?



Debunking The Milk Myth:  
Why Milk Is Bad For You And  
Your Bones

MARK  
**HYMAN**, MD  
EIGHT-TIME *The New York Times* BEST SELLING AUTHOR

Dairy: 6 Reasons You Should Avoid It at all Costs



**AUTHORITY NUTRITION**  
— An Evidence-Based Approach —

Is Dairy Bad For You, or Good? The Milky, Cheesy Truth

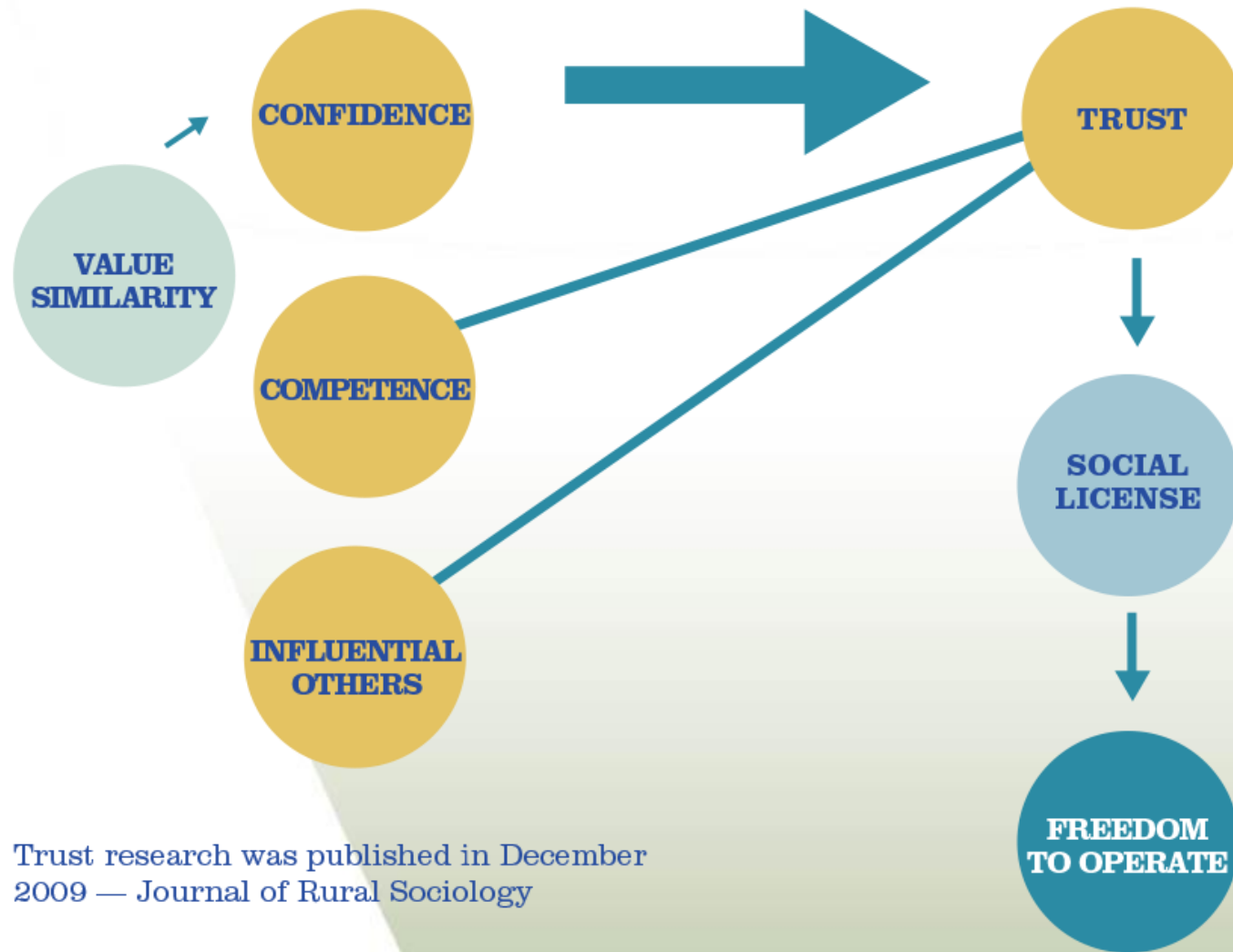
FOOD INTEGRITY

# Growing Challenges: Animal Welfare





# CFI Trust Model

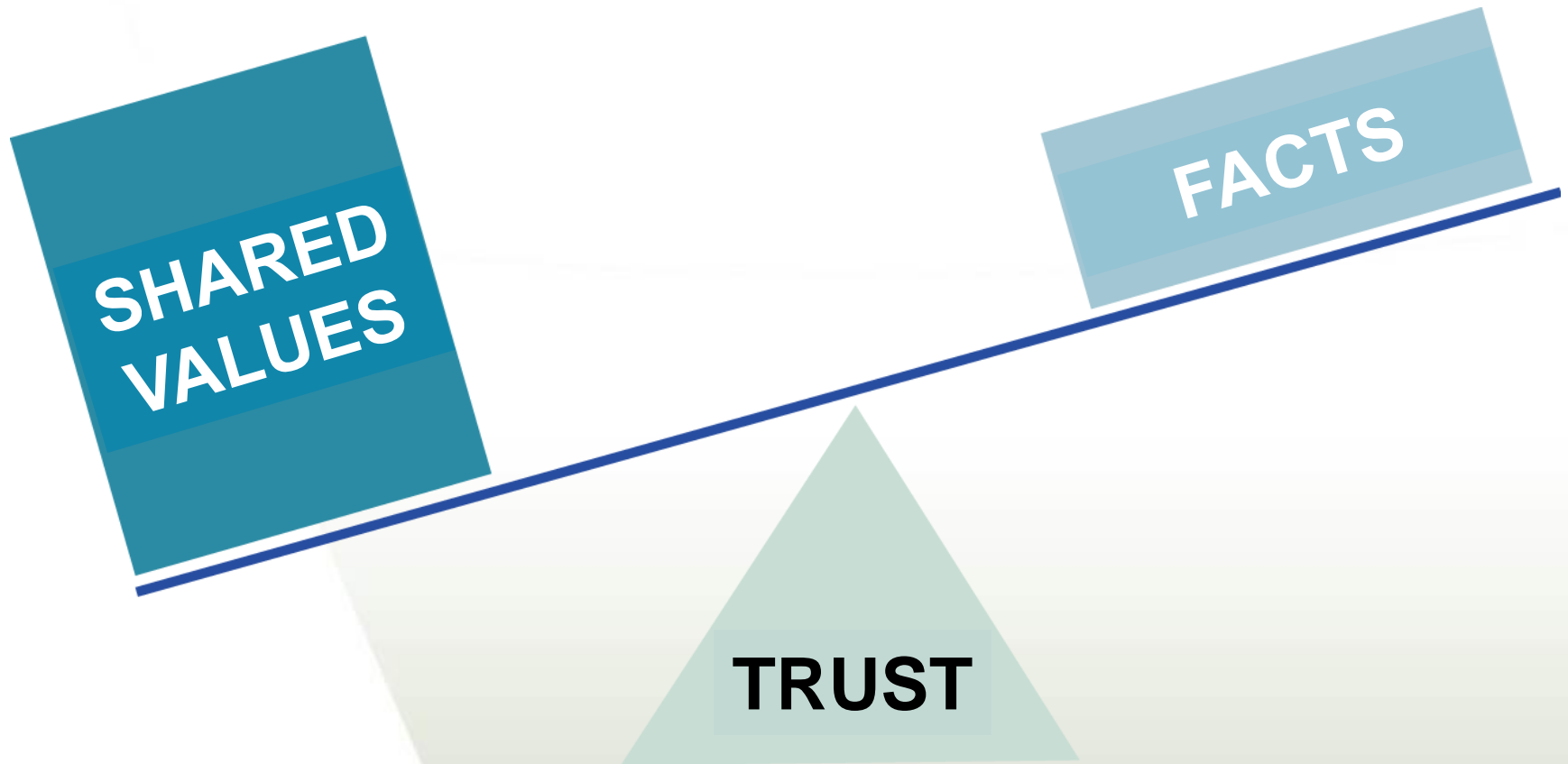


Trust research was published in December 2009 — Journal of Rural Sociology



THE CENTER FOR  
FOOD INTEGRITY™

# What Drives Consumer Trust?



**Shared values are 3-5x more important to building trust than sharing facts or demonstrating technical skills/expertise**

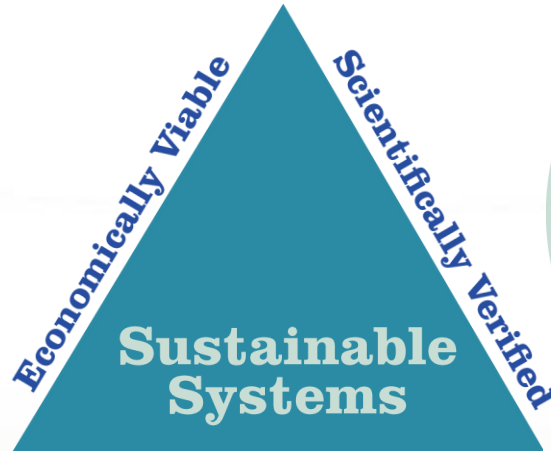


THE CENTER FOR  
FOOD INTEGRITY™

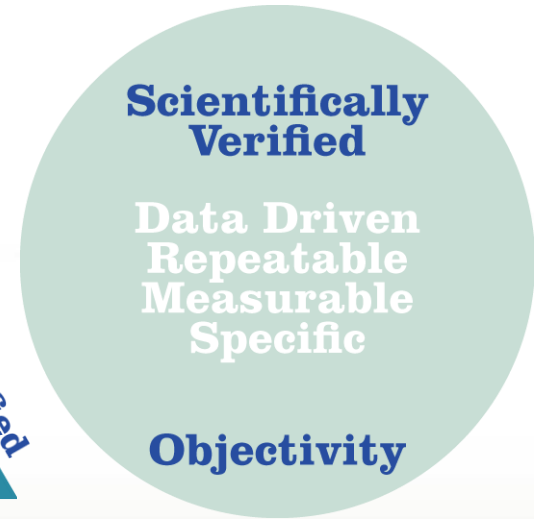
# Sustainable Balance



**Knowledge**



**Ethically Grounded**



**Knowledge**

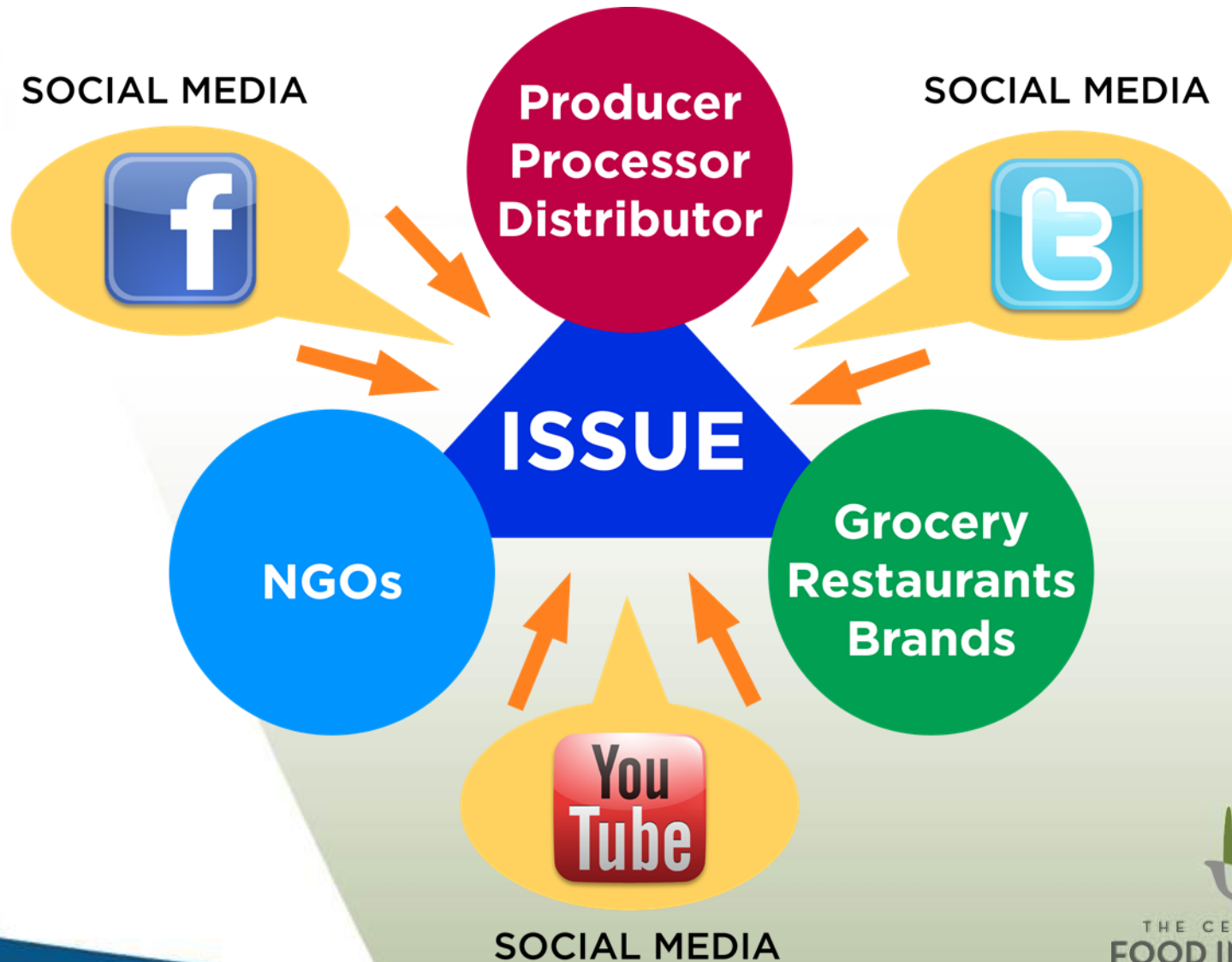


**Feelings  
Belief**



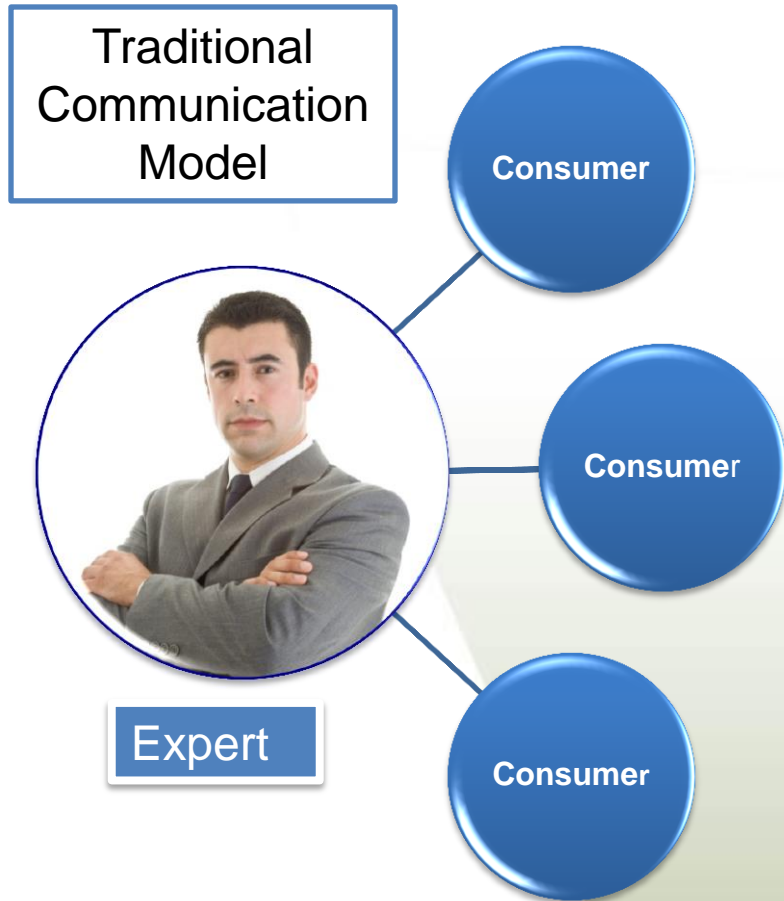


# Radically Transparent Environment



THE CENTER FOR  
FOOD INTEGRITY™

# Traditional Communication Model is Less Effective in Today's Environment



# The “Mom Tribe” Consumer Panel

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.”*



THE CENTER FOR  
FOOD INTEGRITY™



# Tribal Shunning



*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.”*



THE CENTER FOR  
FOOD INTEGRITY™

# Food Babe



*"I am just a regular everyday person like you. Don't let anyone ever tell you, you have to be a nutritionist or scientist to figure this out. We all have the ability to change our bodies, our health and the world once we find out what's really in our food."*



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

# 2015 Consumer Research Consumer Concerns About Life and Current Events

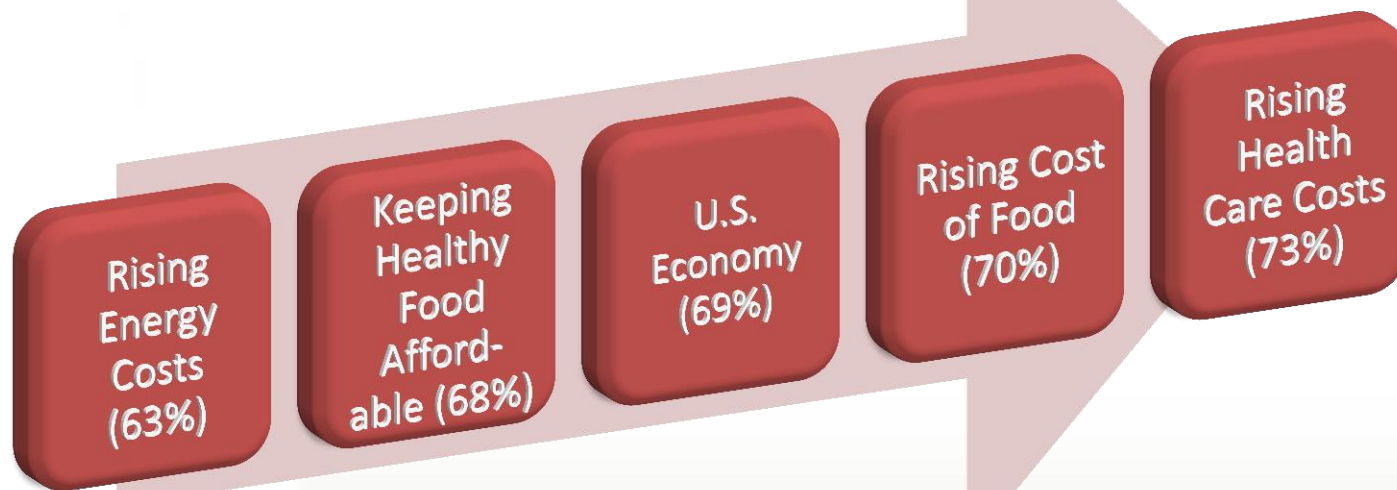


THE CENTER FOR  
FOOD INTEGRITY<sup>SM</sup>





# All of the Most Concerning Life Issues are Beyond the Consumer's Direct Control



Women were more concerned about most issues than men

## Additional Food System Concerns\*

- Food Safety (62%)
- Enough to Feed U.S. (53%)
- Humane Treatment of Farm Animals (47%)

\*Top Box ratings (8-10)

## Early Adopters

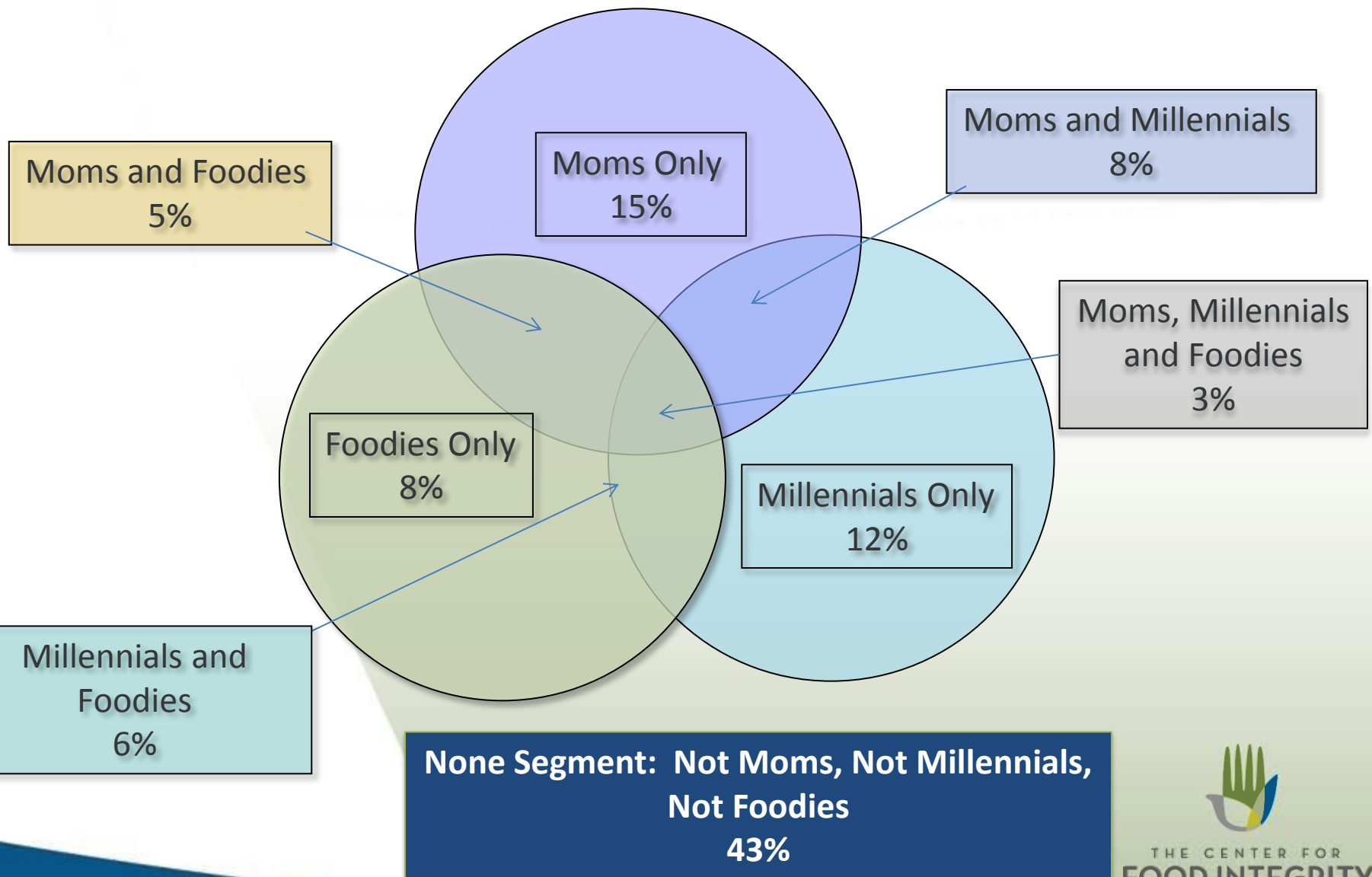
Earlier adopters were more concerned about all issues than later adopters

Lowest concern was for having enough food to feed people outside the U.S. (31%)



THE CENTER FOR  
FOOD INTEGRITY™

# Segmenting Moms, Millennials and Foodies



THE CENTER FOR  
FOOD INTEGRITY™

# Top Concerns About Issues by Segment



MOMS

## Moms

Rising Cost of Food(8.59)

Rising Health Care Costs(8.51)

Keeping Healthy Food Affordable(8.51)

U.S. Economy(8.34)

Rising Energy Costs ( 8.18)

## Millennials

Keeping Healthy Food Affordable(8.15)

Rising Cost of Food(8.01)

Rising Health Care Costs(7.95)

U.S. Economy(7.91)

Rising Energy Costs(7.63)



Foodies

## Foodies

Keeping Healthy Food Affordable(9.12)

Rising Health Care Costs ( 9.08)

Rising Cost of Food ( 9.00)

U.S. Economy(8.98)

Rising Energy Costs ( 8.86)

## Early Adopters

Rising Cost of Food ( 8.83)

Rising Health Care Costs(8.51)

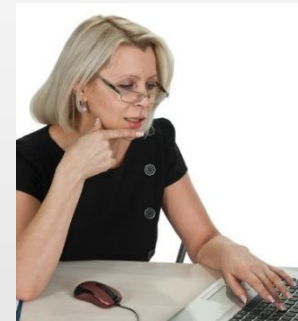
Keeping Healthy Food Affordable(8.49)

U.S. Economy(8.34)

Rising Energy Costs ( 8.09)



Millennials



Early Adopter

Foodies Expressed a Higher Level of Concern



THE CENTER FOR  
FOOD INTEGRITY™



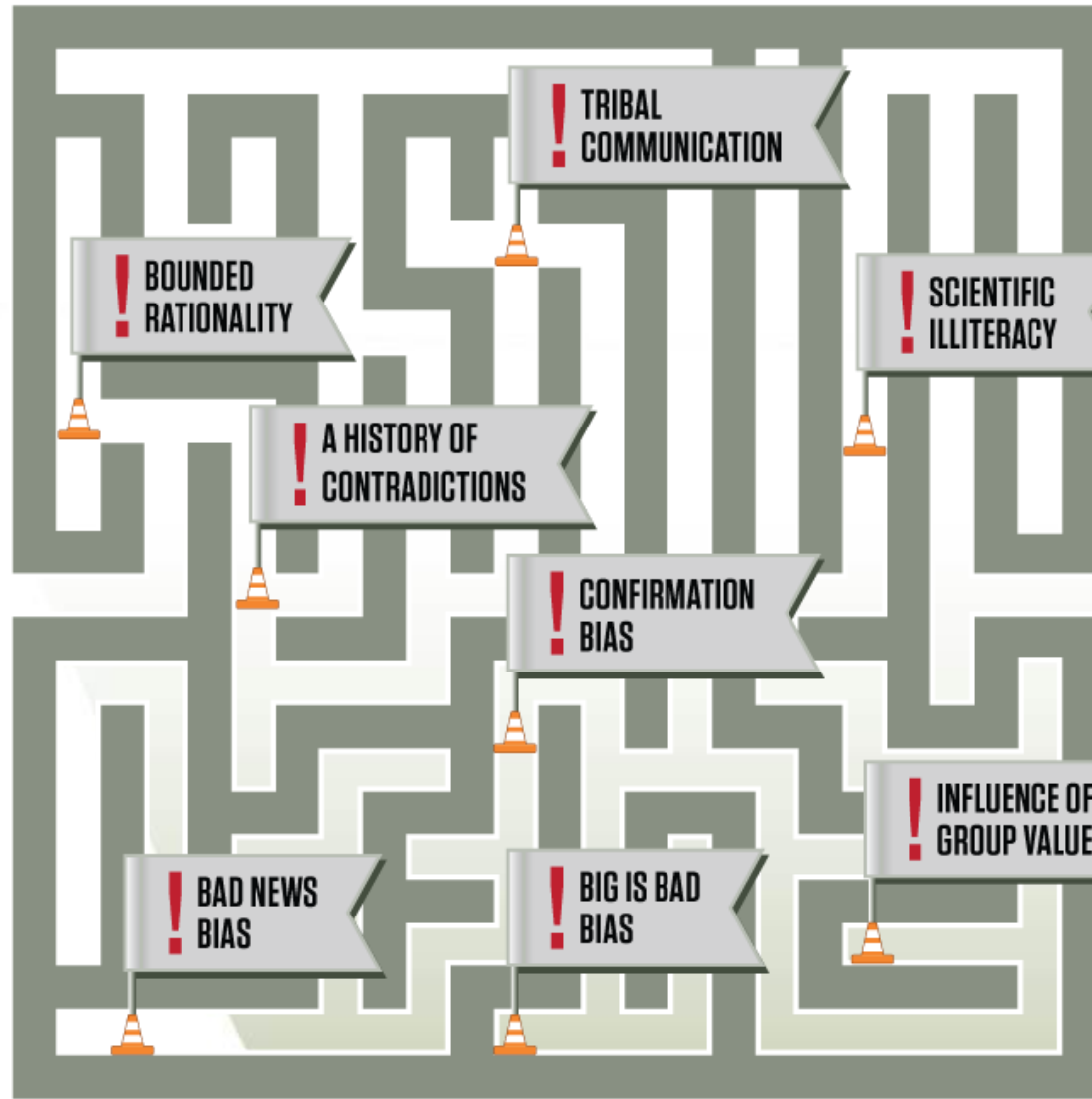
# Making Science Relevant

- 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 build trust in our products, processes, people and brands.



THE CENTER FOR  
FOOD INTEGRITY™

# The Decision-Making Maze



**INFORMED  
DECISION  
MAKING**



THE CENTER FOR  
FOOD INTEGRITY™

# Social/Consumer Decision Making



THE CENTER FOR  
FOOD INTEGRITY™



# Building Blocks of Technical Messages

## Fundamental Message Elements



# Fundamental Message Elements

## Fundamental Message Elements

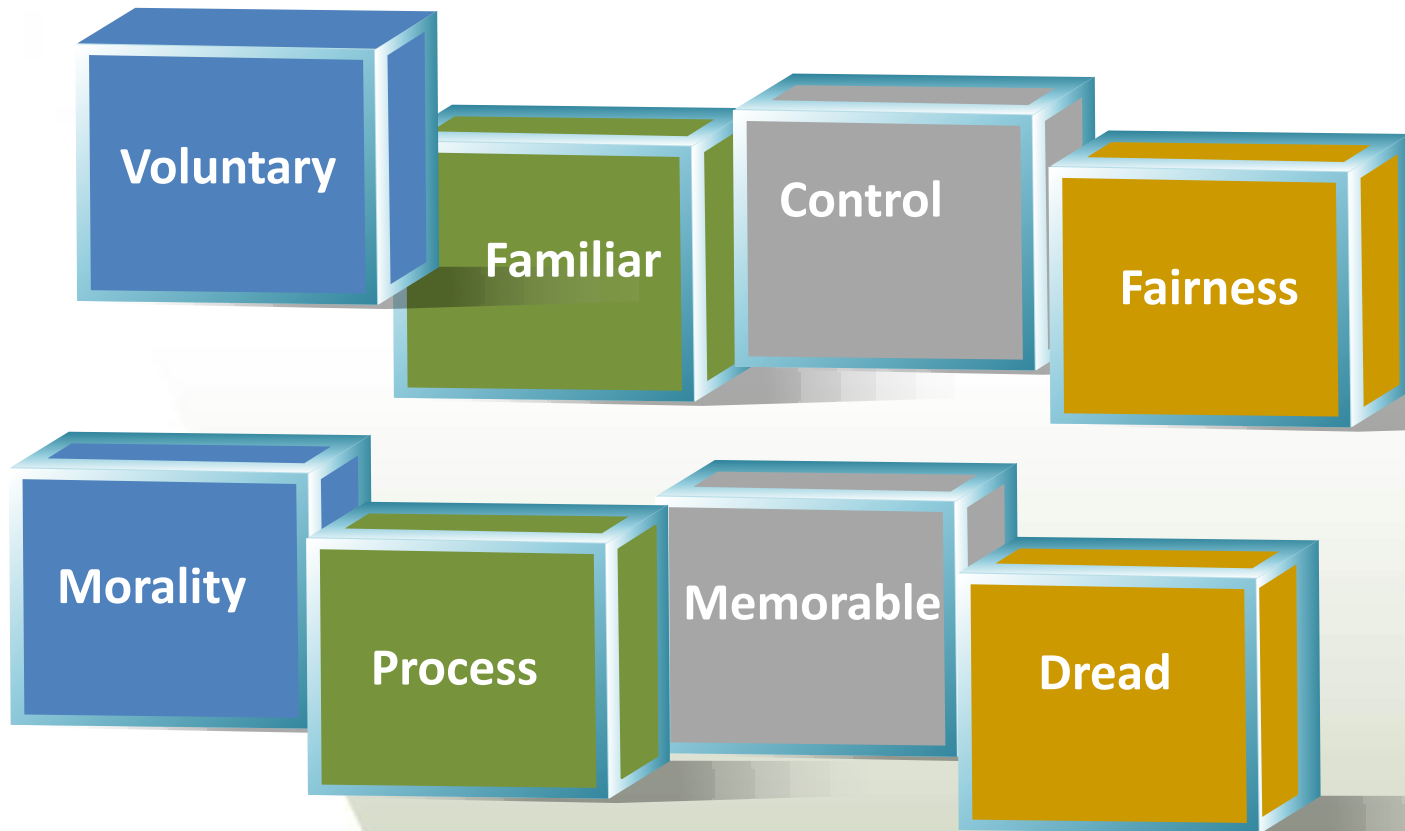
- ✓ **Unifying Message:** Singular, compelling message that touches the deeper drivers of human behavior - values
- ✓ **Openness/Transparency:** Acknowledge both sides of the story, provide level of depth so it does not look like “holding back,” avoid oversimplification
- ✓ **Accurate Presentation of Risks:** Present known risks since known risks “trump” unknown risks by accurately communicating safety facts
- ✓ **Trusted Sources:** Leveraging trustworthy sources (use credible expert sources)



# Building Blocks of Technical Messages

(Continued)

## Outrage Factors



THE CENTER FOR  
FOOD INTEGRITY™



# 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.

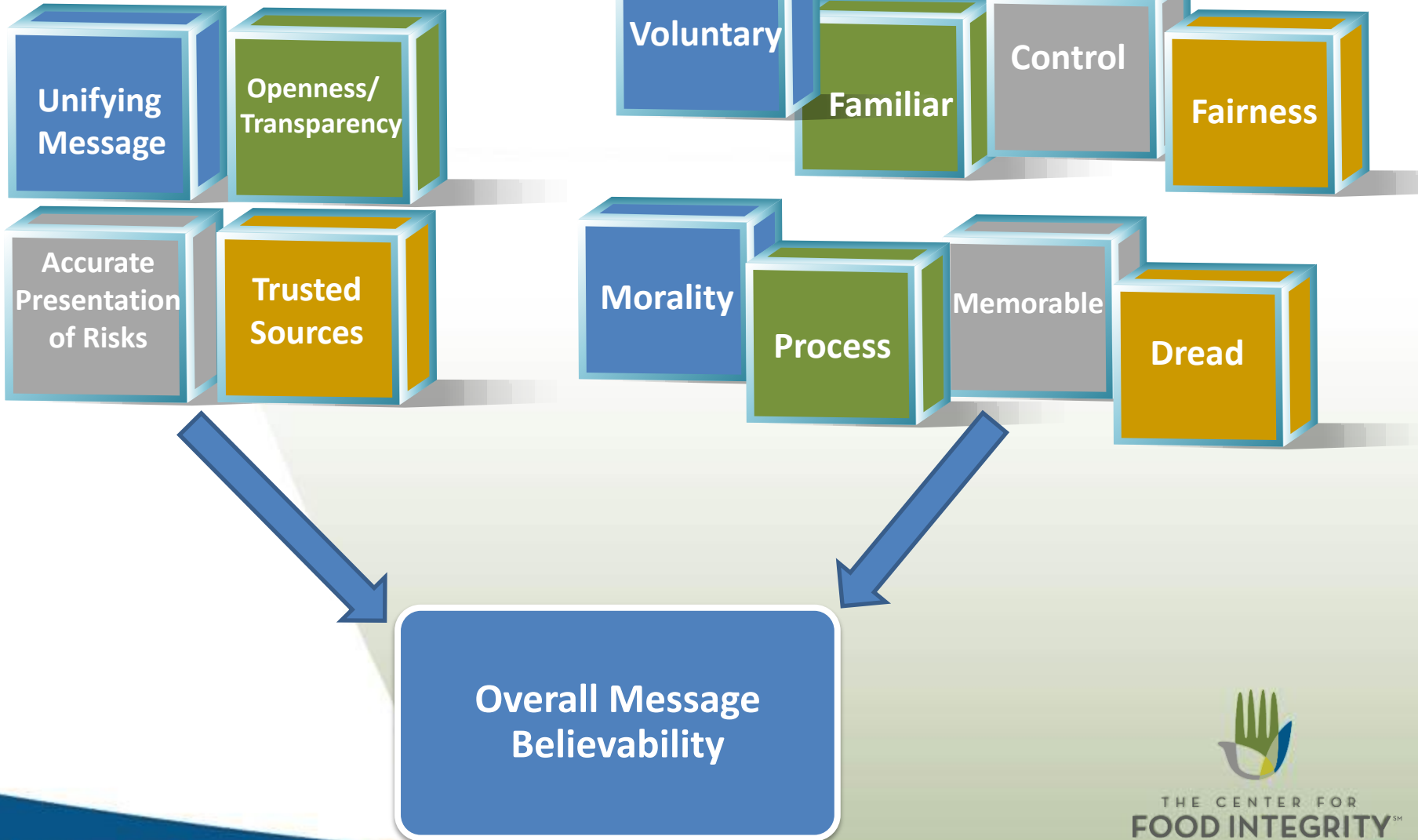


# Predicting MESSAGE Believability



## Fundamental Message Elements

## Outrage Factors



THE CENTER FOR  
FOOD INTEGRITY™

# 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 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

## Outrage Factors

- ✓ **Control:** Government agencies address risks competently
- ✓ **Process:** Company/Organization/Agency is listening, engaging and providing information



# Putting the Research to Work

- 1. Believability is a key driver in creating information that is trusted.** Evaluate the information you want to share against the Fundamental Message Elements and Outrage Factors in the research model and modify where necessary to align your information with the models. (Let us know if CFI can help.)
- 2. Identify the groups you would like to engage.** Who are the Early Adopters within those groups? What are their values and concerns? Who are likely to be sources they view as credible? Listen to the concerns and understand their values before developing your strategy.
- 3. Meet Them Where They Are.** Today's monitoring technology allows you to identify the digital and physical communities where conversations about food are taking place. Select those communities that are important to you and develop engagement strategies. Be a good neighbor when you "move in" to the community and remember that how you choose to engage will determine how your new neighbors respond.



# Putting the Research to Work

- 4. Develop a values based engagement strategy that starts with listening and embracing skepticism.** Engage with the groups you've identified and focus on building relationship before sharing information. Understand and appreciate the group expectations and cultural norms as they will influence how to best share information.
- 5. Commit to engaging over time.** Building trust is a process, not an event. Authentic transparency and continued engagement will encourage objective evaluation of information that supports informed decision making.



The National

**FOOD TRANSPARENCY**

Project

# Strategic Insights

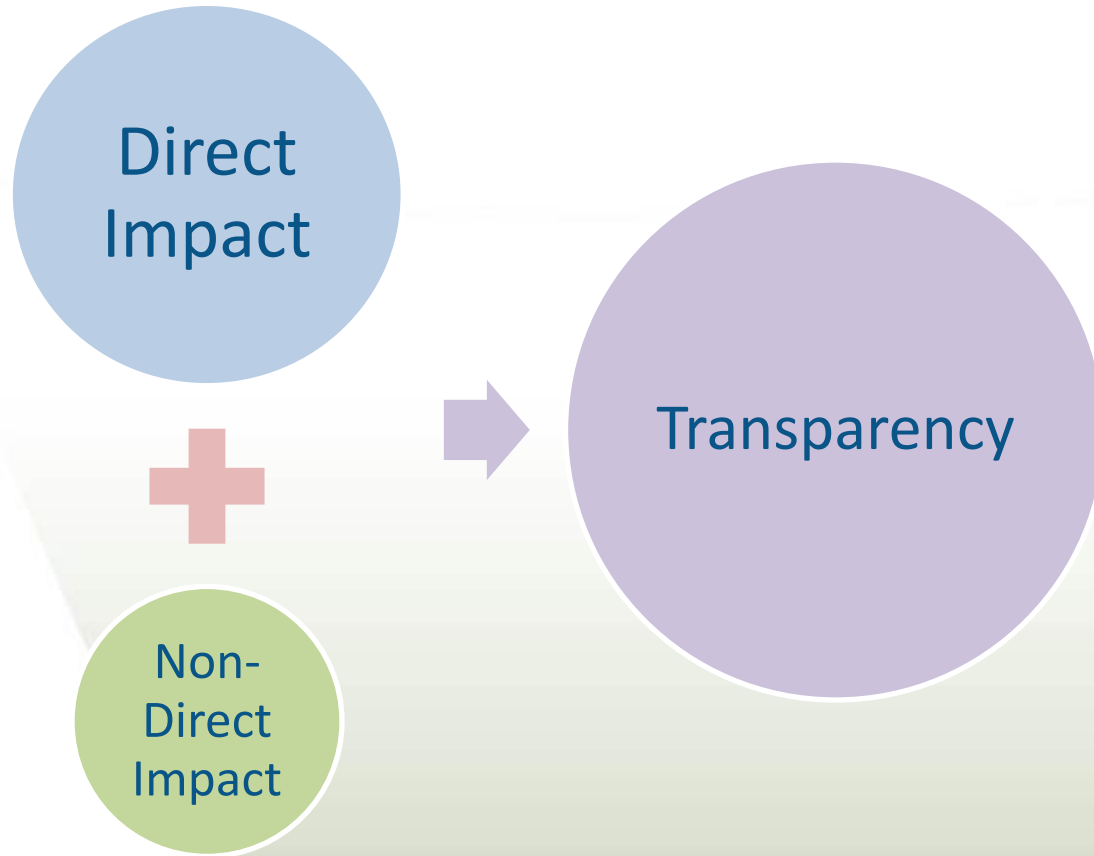


THE CENTER FOR  
FOOD INTEGRITY™





# Two Categories of Issues



# Must Have Information

Information	Food Neutral	Food Aware
Cost/value	√ √ √ √ √ √ √ √	√ √ √ √
Ingredients (natural and artificial)	√ √ √	√ √ √ √ √ √ √ √ √ √ √
Sugar	√ √ √ √ √ √	√ √ √
Salt	√ √ √ √	√ √ √ √ √
Calories	√ √ √ √ √ √	√ √ √
Fat	√ √ √ √	√ √ √
Carbs		√ √
Organic	√	√
Origin (local)	√ √ √	√ √ √ √
Non-GMO	√ √	√ √
Gluten	√	
Cage-free, grass-fed		√ √ √ √
Hormones or antibiotics		√ √
Nutrition facts	√ √	√ √ √ √ √ √
Freshness (expiration date)	√ √ √ √ √ √	√ √
Brand	√ √ √ √	√

# Strategic Insights

- **Health concerns drive food information behavior.** Participants expressed concern about the connection between food and health. Many cite a chronic health issue as triggering greater interest in food information.
  - *“You see cancer and stuff we’re getting more of. There’s more junk in food [and] more people are getting sick.”*
- **Manufacturers are held most accountable for transparency, and they are not making the grade.** Most participants are aggravated by what they view as intentional use of vague and/or misleading terminology in packaging and nutrition information. Most distrust manufacturer-generated information.
  - *“If you’re making food for a living, you’re going to put the least amount of information you can on it to make it sell.”*



# Strategic Insights

- **Transparency expectations, standards and trust vary by channel and product.** More transparency expected from - and higher trust in - food co-ops and retailers such as Trader Joe's than mass, chain or discount grocers. Most expect less from restaurants. Top transparency concern: meat, fish & dairy products.
- **Consumers want clarity, simplicity and guidance.** The top complaint is ingredient list complexity. Many would like unfamiliar ingredients translated; expanded info on “hidden” ingredients bundled under ambiguous terms like “other natural ingredients;” and a nutrition rating or score system.
  - *“They group everything into ‘artificial ingredients.’ What are those ingredients? It should be more transparent.”*





# Implications for You

- **Who you are is as important as what you know**
  - Communicating shared values makes technical information more relevant and accessible
- **Embrace skepticism – It's not personal, it's a social condition**
  - Skepticism is the fuel for scientific discovery
- **The public wants information from academics but not academic information**
  - Learn to speak the language of social media
- **Transparency is no longer optional**
  - Authentic transparency is the path to building trust in science and technology in food



# Three Things You Can Do

- 1. Begin all your public engagement using shared values**
  - *“People don’t care how much you know until they know how much you care.” T. Roosevelt*
- 2. Open the digital door to today’s food production and processing**
  - Find ways to make what you do transparent to illustrate your commitment to do “what’s right”
- 3. Commit to engaging early, often and consistently.**
  - Your voice, your knowledge and your credibility matter. You can make a difference in building public support, but you have to learn how to play by new rules



# Consumer Confidence

## Building Trust in Your Products



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

Charlie Arnot

Charlie.Arnot@Foodintegrity.org

[www.foodintegrity.org](http://www.foodintegrity.org)

[www.bestfoodfacts.org](http://www.bestfoodfacts.org)