



Consumer Trust in the Food System
Research Study Highlights
October, 2008

**Research Methodology
and Sample Design**

- Recruiting through Survey Sampling International's consumer Web panel
 - World leader in Web-based surveys
- Total of 2,066 completed surveys (sampling error at 95% confidence level +/- 2.2%)
- Web surveys averaged 25 minutes
- Data collected in July 2008
- Split sample to accommodate the survey content. Each sub-sample contained:
 - Half primary grocery shoppers and half non-primary grocery shoppers
 - Minimum of 400 males

Respondent Profile

- 54% Female and 46% Male
- 75% were primary shoppers in the house
- ~90% shopping once or twice per week
- Representative of the typical U.S. food shopper regarding:
 - education
 - income
 - political orientation
 - vegetarian practices
 - consumer advocacy

Concerns - Key Issues

Key Insights:

- Consumers main concerns are rising costs and the economy
- Consumers are more concerned about food safety than the war in Iraq

Mean Summary of Concerns About Issues

(n=2066)

Issues	Total
Rising Energy Costs	8.37
The U.S. Economy	8.25
Rising Cost of Food	8.09
Rising Health Care Costs	7.73
Personal Financial Situation	7.51
Food Safety	7.03
The War in Iraq	6.97
Illegal Immigrants Working in the Food System	5.81
Global Warming	5.79
Humane Treatment of Farm Animals	5.66
The Impact of Immigrants Who are in the Country Legally Working in the Food System	4.16

0=No concern 10=Very concerned

Food Safety

Key Insights:

- Consumer feel that farmers/producers and food companies and processors are most responsible for the safety of their food
- Consumers trust themselves and those that prepare food in their homes more than any other audience
- Consumers have a high amount of trust in farmers/producers when it comes to food safety
- Shared values are 5-times more important than technical skills
- Consumer trust in food safety is decreasing

Summary of Food Safety Ratings

Segments	Responsibility	Trust	Willingness to comply
You or other persons who prepare your food at home	15.0	8.43	7.81
Farmers/producers	20.2	6.56	6.99
Grocery stores	10.1	5.96	6.63
Food companies/ processors	18.4	5.33	6.35
Restaurants	9.5	5.66	6.38
State regulatory agencies	9.2	5.08	6.18
Federal regulatory agencies	13.5	5.07	6.22
Advocacy groups	4.1	4.83	5.54

Top box groups that are significantly higher than all other groups

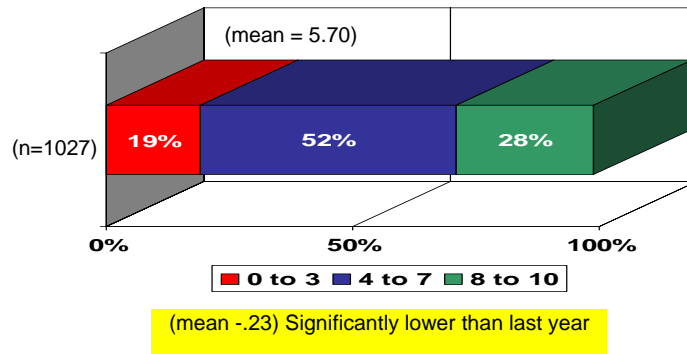
Mid-level groups that are significantly higher than the groups with lower ratings

Bar Chart Scale:

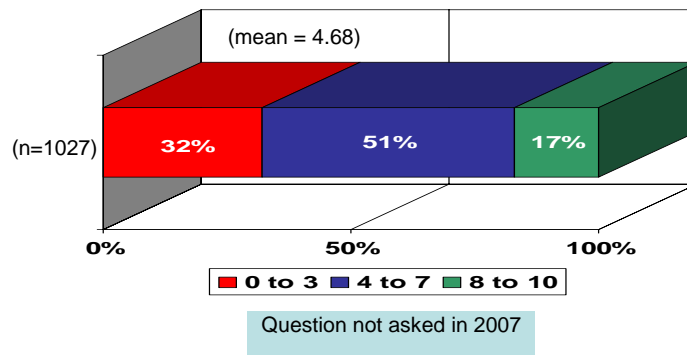
0 = Strongly Disagree 10 = Strongly Agree

Food Safety

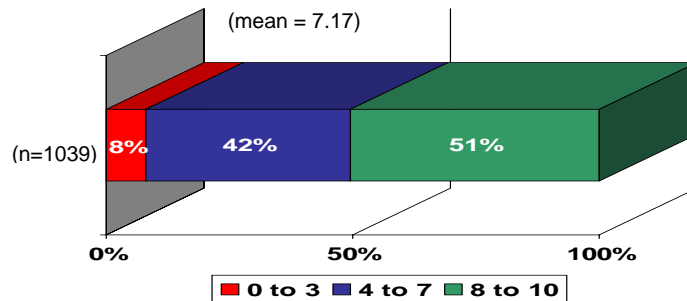
“I am confident in the safety of the food I eat”



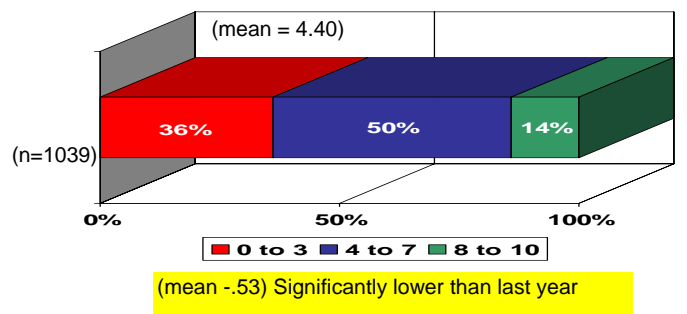
“Government food safety agencies are doing a good job ensuring the safety of the food we eat”



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



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



Humane Treatment of Farm Animals

Key Insights:

- Organizations working with farmers and producers can strengthen consumer trust in their humane treatment of farm animals by:
 - Demonstrating that the producers share their values
 - Proving that the farmers and producers are doing what they say
- We have a lot more work to do to earn trust

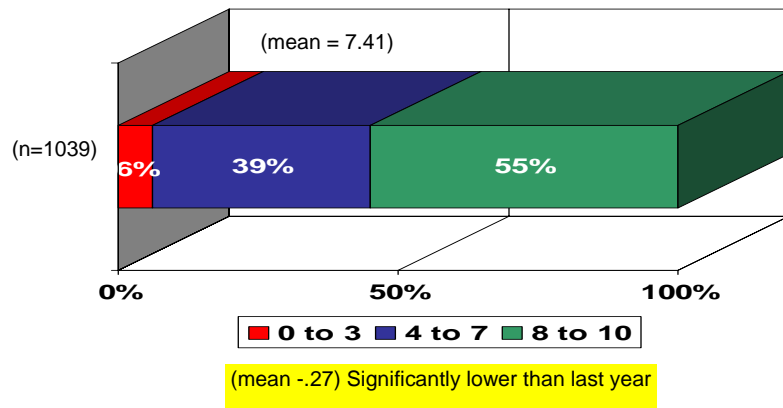
Humane Treatment of Farm Animals

Segments	Responsibility	Trust	Willingness to Support
Farmers/producers	36.8	5.84	6.44
Advocacy groups	11.2	5.49	5.62
Federal regulatory agencies	18.9	5.24	5.74
Grocery stores	8.4	5.15	5.40
Restaurants	7.6	5.05	5.31
Food companies/ processors	17.2	4.42	5.04

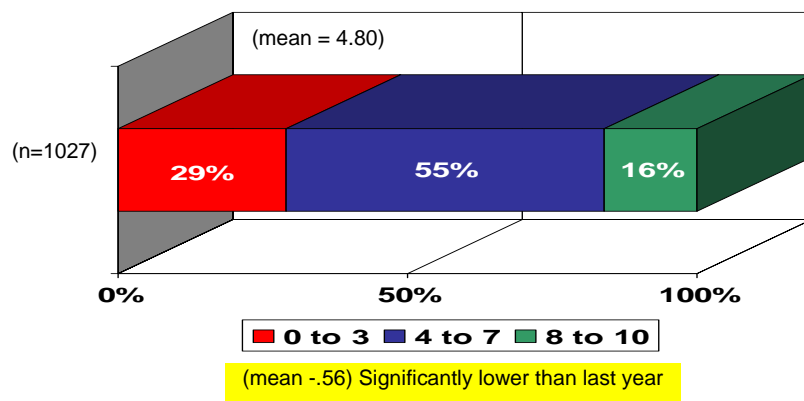
Top box group that is significantly higher than all other groups

31

“If farm animals are treated decently and humanely, I have no problem consuming meat, milk and eggs”



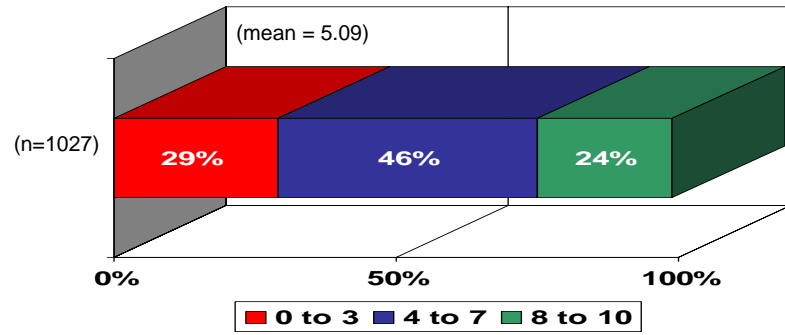
“U.S. meat is derived from humanely treated animals”



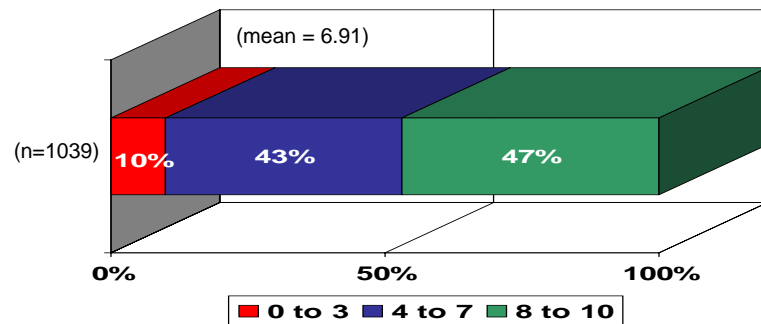
Bar Chart Scale:

0 = Strongly Disagree 10 = Strongly Agree

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



“I would support a law in my state to ensure the humane treatment of farm animals”



Immigration Policy

Key Insights:

- Consumers want secure borders and workplace enforcement.
- There is some support for guest workers under specific circumstances.
- Can that support be increased by coupling guest worker elements with tighter border security and more consistent workplace enforcement?

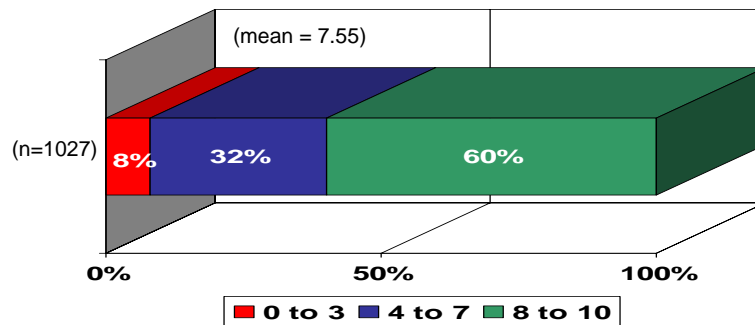
Set Up For Immigration Policy Questions

Historically, agriculture and the food industry have relied on immigrant labor or guest workers to help grow, process, transport, prepare and serve food. With millions of jobs located on the farm, in processing plants, in transportation, restaurants, food retailing and throughout the industries which support our food system, a stable, legal work force is critical to providing a safe, abundant and affordable food supply for American consumers.

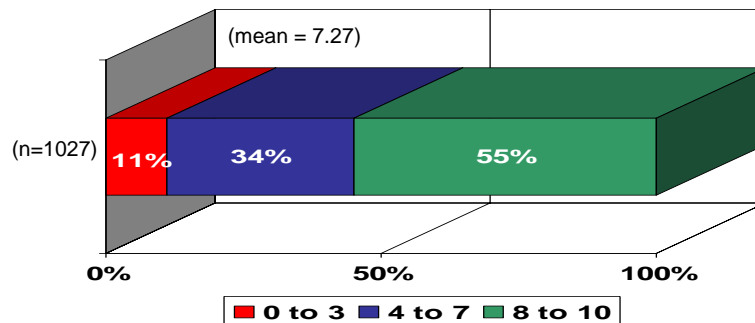
The government estimates that 11-12 million unauthorized immigrants currently live and work in the U.S. Many of them are working in industries which support the food system, such as agriculture, food processing, restaurants or food retailing.

0 = Would not support 5 = Might or might not support 10 = Would support

Support for stringent enforcement of immigration laws in the workplace



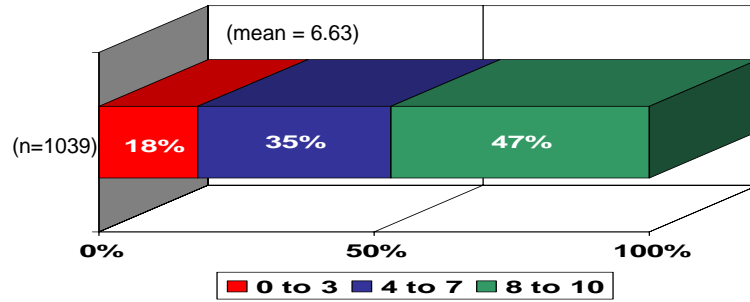
Support for stronger security at U.S. borders to reduce the influx of unauthorized workers



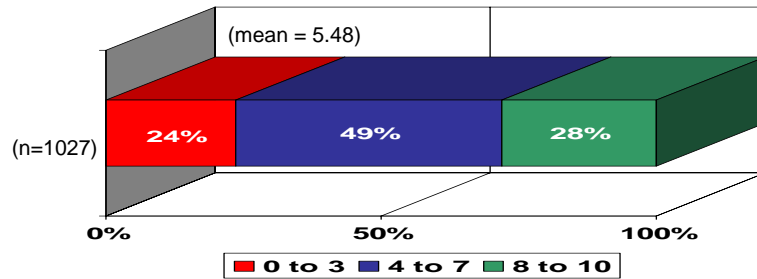
Bar Chart Scale:

0 = Strongly Disagree 10 = Strongly Agree

“Illegal immigration is a threat to our national security”



“Legally documented migrant workers are critical to the health of our economy”



Sustainability

Key Insights:

- There is a significant opportunity to define sustainability in a balanced fashion as it pertains to the contemporary food system.
- Significant work needs to be done to better understand the drivers and implications of granting and revoking social license to groups within the contemporary food system.

Beliefs About Sustainability of Products and Impact on Food Purchasing Behavior

- Consumers read the following statement before answering questions on sustainability:
*Global food demand is growing rapidly and is expected to double in the next 40 years. To meet this demand without dramatically impacting climate change, we have to produce more food using fewer resources. There is also growing interest in the ethical practices or socially responsible behavior of those in the food system. **Doing the “right thing” and producing, transporting and selling food with limited impact on the environment is sometimes referred to as “sustainability.”***

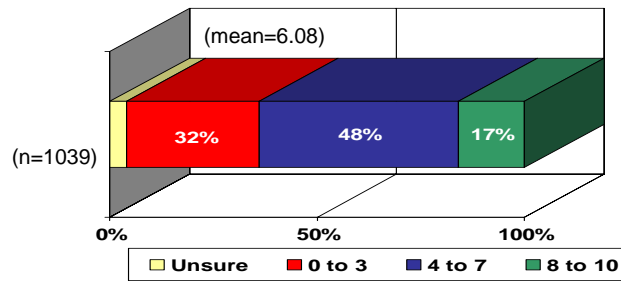
54

Beliefs About Sustainability of Products and Impact on Food Purchasing Behavior

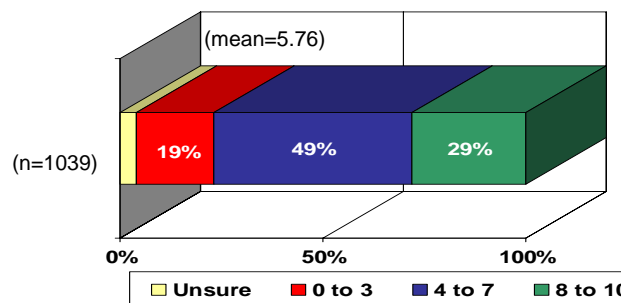
- Used a 0 to 10 scale where “0” meant they strongly disagreed with the statement and “10” meant they strongly agreed with it
 - 0 to 3 ratings indicate relatively strong levels of disagreement
 - 4 to 7 ratings indicate uncertainty or ambivalence
 - 8 to 10 ratings indicate relatively strong level of agreement
- Very few consumers strongly agreed with any of the four statements, with top box ratings (8 to 10) ranging from 17% to 33%.

55

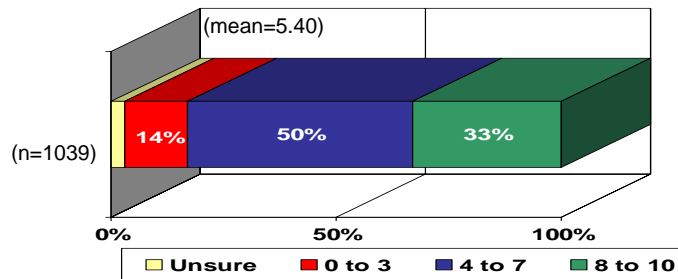
“I care about sustainability, but price is more important in making purchasing decisions”



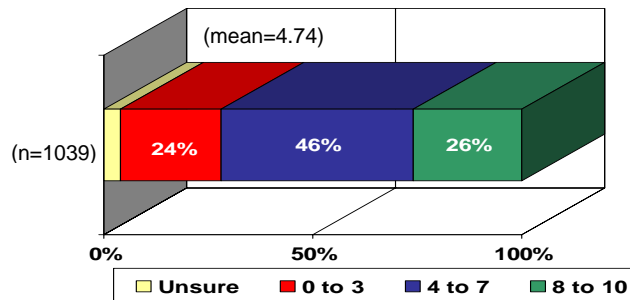
“I try to balance price and sustainability. I am concerned about sustainability but I want to make sure if I pay more it has a real impact”



“I don’t believe my purchasing decisions have any impact on sustainability. I make my decision based on price”



“I make my food purchasing decisions based primarily on how sustainable I believe the product is, regardless of price”

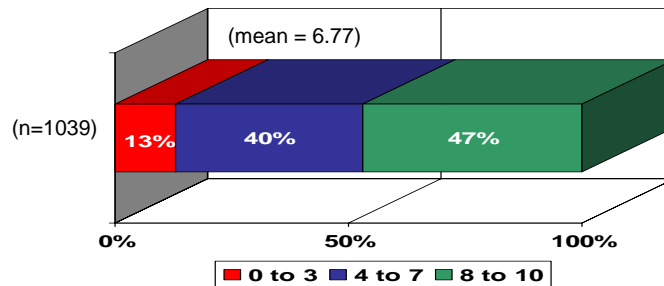


Economics

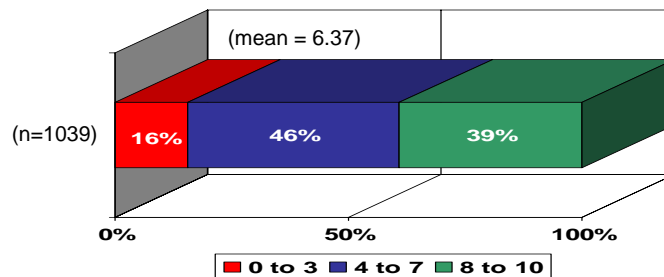
Key Insights:

- Consumer concern over increasing food prices and economics in general has increased dramatically

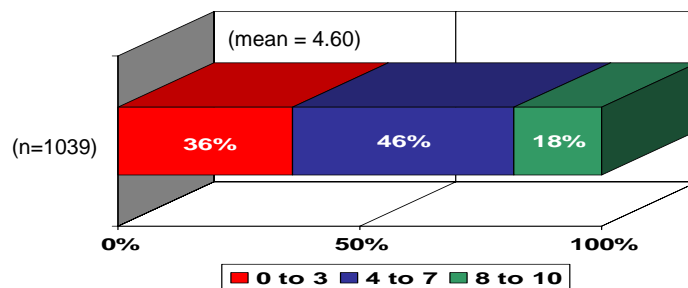
“With the increase in food prices, we tend to eat out less than one year ago”



“With the increase in food prices, I am more likely to buy less expensive cuts of meat”



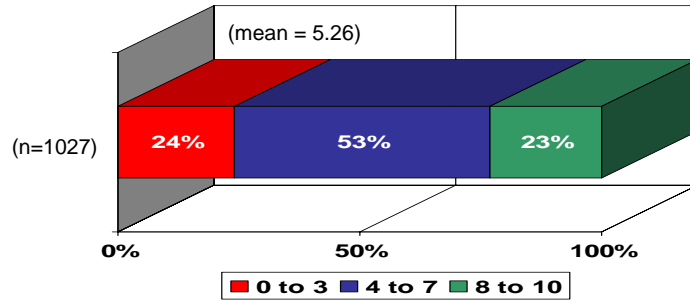
“With the increase in food prices, I buy more canned fruits and vegetables instead of fresh”



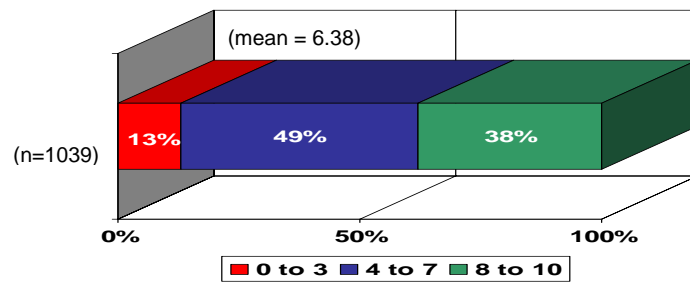
Bar Chart Scale:

0 = Strongly Disagree 10 = Strongly Agree

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



“I make a special effort to buy items produced in the United States”



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

