

Inside the Minds of Influencers

The Truth About Trust



THE CENTER FOR
FOOD INTEGRITYSM

Consejo
Mexicano
de la **Carne**

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Today's Objectives

- How did trust in ag and food become compromised?
- What we've learned about building trust
- Now what? How do we restore and maintain trust?



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A man and a woman are seated at a table in a restaurant, looking at a menu. The man is on the left, wearing glasses and a striped shirt. The woman is on the right, wearing a patterned top. The background is blurred, showing other tables and chairs. The text is overlaid in the center of the image.

**How did trust in ag and
food
become compromised?**

Today's Food System

Safer

More available

More affordable

Consumers are more skeptical and concerned.



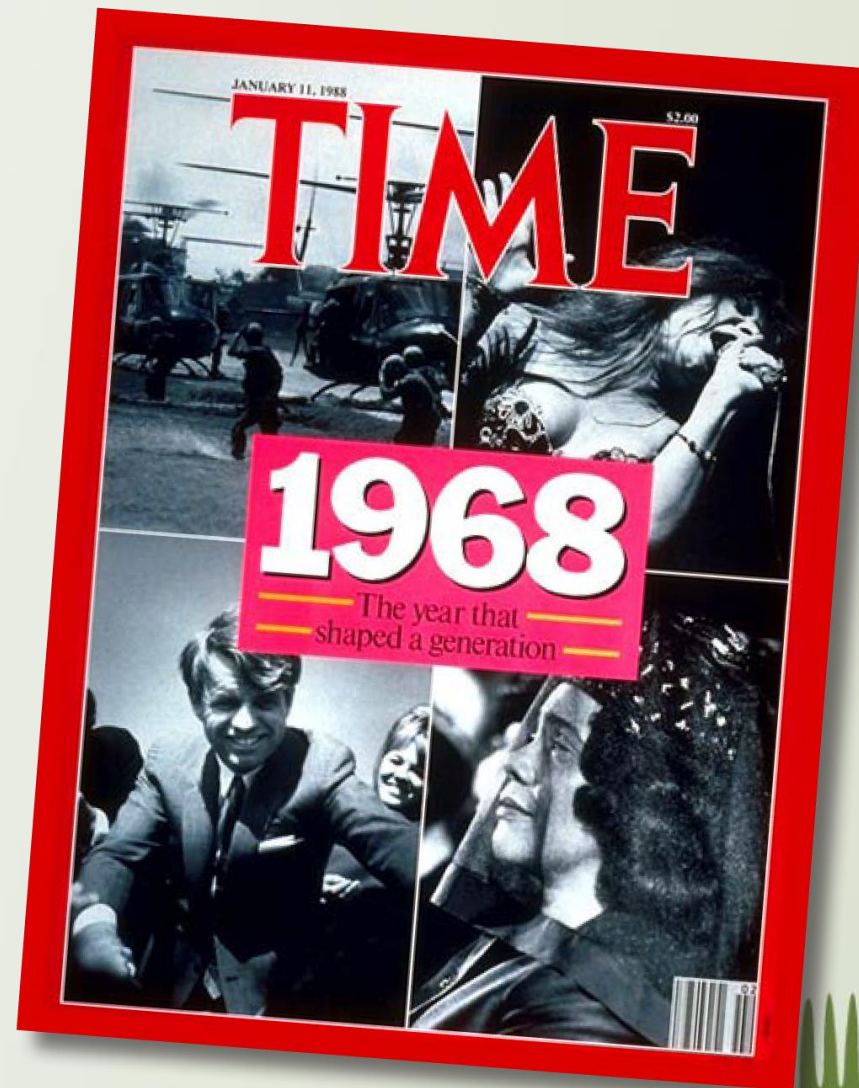
How did that happen?



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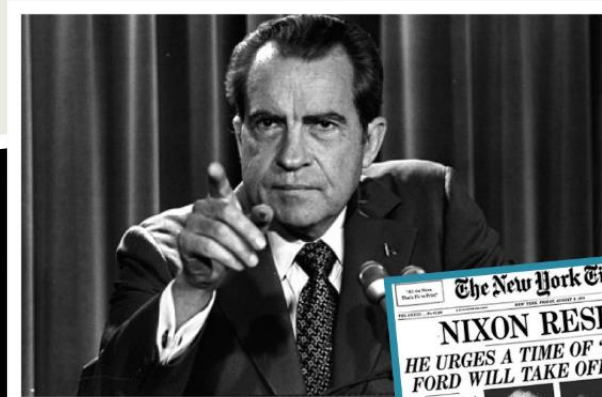
1968

THE YEAR THAT
SHAPED A
GENERATION.



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50 Years of Violations of Public Trust

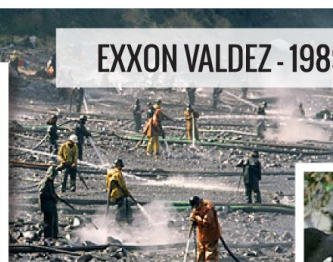


IRAN CONTRA - 1986

THREE MILE ISLAND - 1979



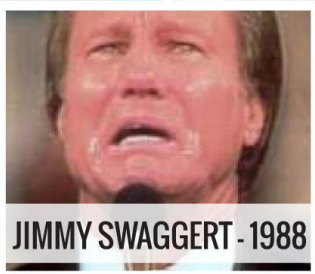
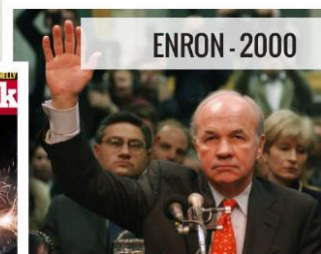
EXXON VALDEZ - 1989



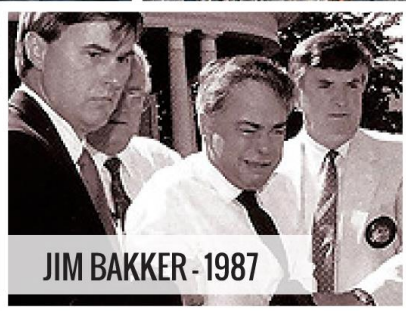
CLINTON SCANDAL - 1998



ENRON - 2000



JIMMY SWAGGERT - 1988



JIM BAKKER - 1987

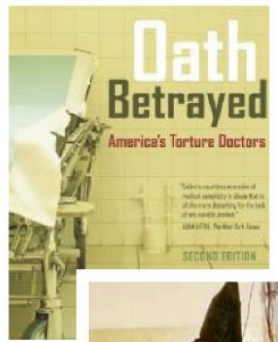


ARTHUR ANDERSEN - 2002



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50 Years of Violations of Public Trust



JOHN EDWARDS - 2008



TIGER WOODS - 2009

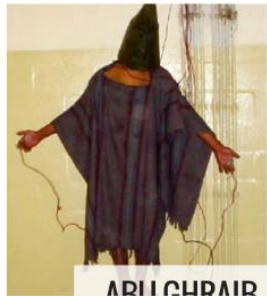
LEHMAN BROTHERS BANKRUPTCY - 2008



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



ARIEH CHAIKIN - 2008



ELIOT SPITZER - 2008

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



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

BP OIL SPILL - 2010



PENN STATE - 2011



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The Decline of Trust

The frequency and visibility of
violations of public trust

have been consistent enough to breed
public skepticism

about whether government, businesses and other institutions
are

worthy of trust.



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Consolidation, Integration and Industrialization



FOOD, INC.



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Then vs. Now

THEN

--Authority is granted primarily by office

--Broad social consensus driven by white males

--Communication was formal, indirect (mass communication)

--Progress is inevitable

--“Big” is respected

NOW

--Authority is granted primarily by relationship

--No single social consensus, great diversity, many voices

--Communication is informal, direct (masses of communicators)

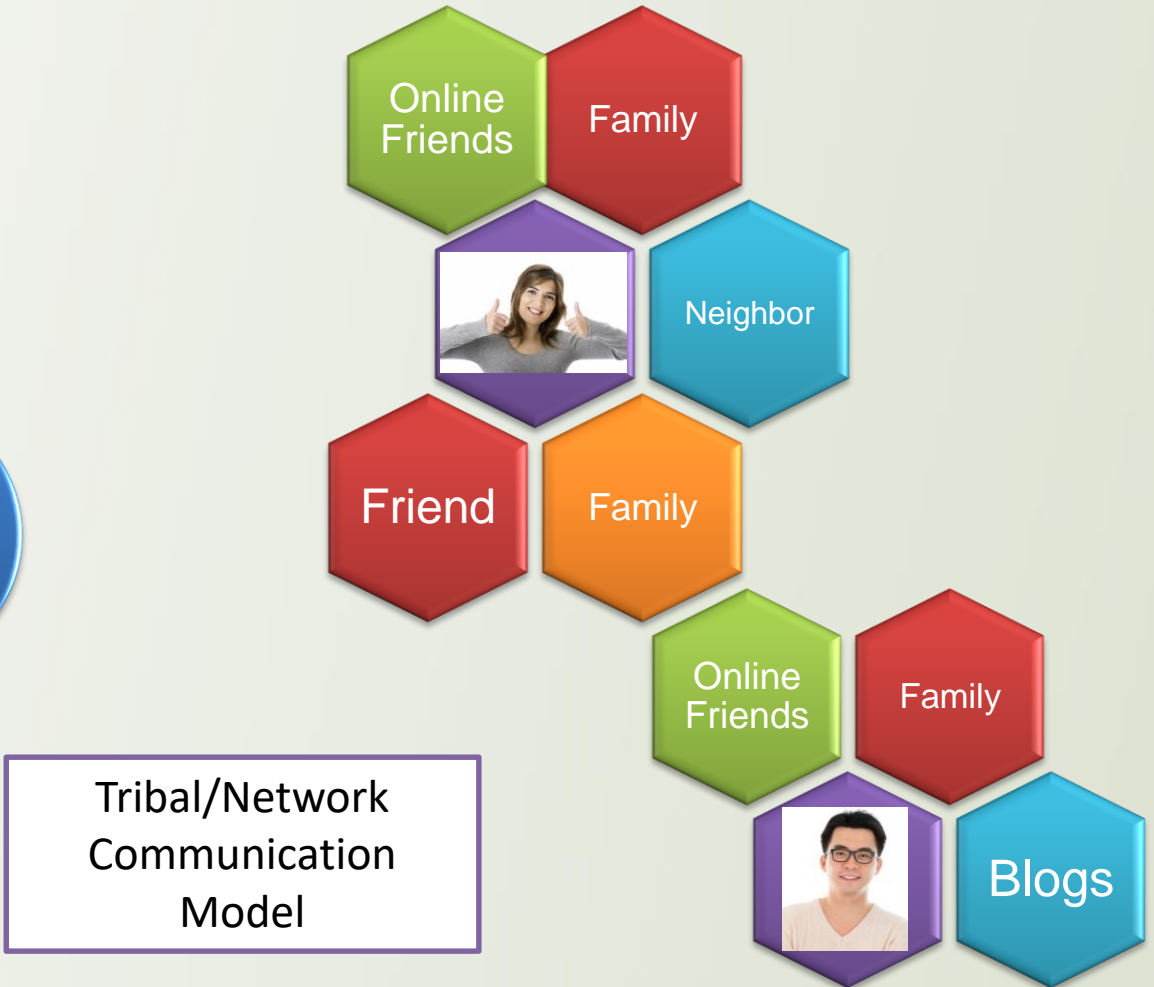
--Progress is possible

--“Big” is bad

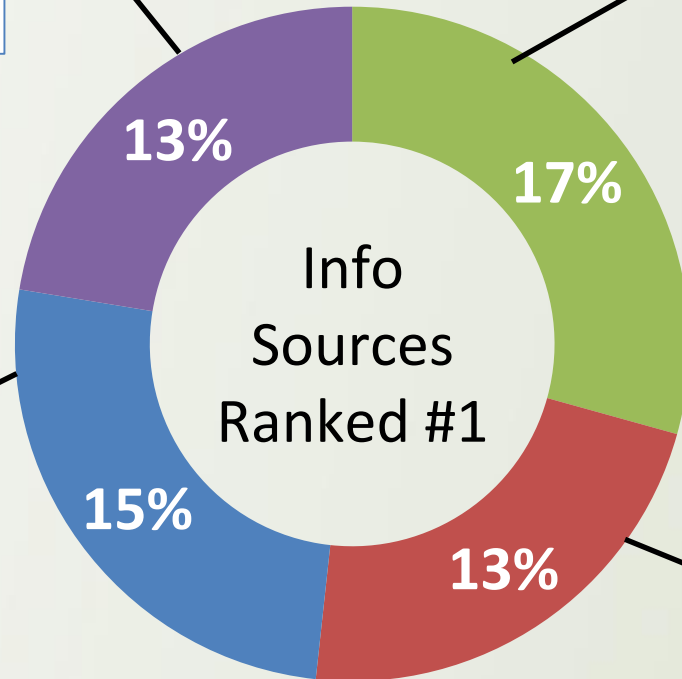


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Traditional Communications are Less Effective Today



#1 Sources of Information About the Food System are Diverse



Websites

Search Engines

Local TV

Family –
Not Online



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Online Information Meeting Needs-Shaping Opinions

- More than half (59%) believe they have all of the information they need, related to food, to make good decisions for themselves and their family
- More than one in three (39%) strongly believe that information found online helps shape their opinions about food related issues
- Most common topics searched online included Ingredients in Food (65%), Impact of Food on Health (57%) and Food Safety (51%)
- Search Engines like Google or Bing (73%) are the most common starting place on the Internet for answers to a food-related question



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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.”



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The “Mom Tribe” Consumer Panel



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.”



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BFF – Do Onions Absorb Bacteria That Cause Illness?

No, onions do not absorb bacteria. The idea that a vegetable would attract and suck into itself bacteria from the air is not even logical. The onion may turn black because it would eventually rot from both cell breakdown events and bacterial contamination if you left it out, not because it absorbs germs.

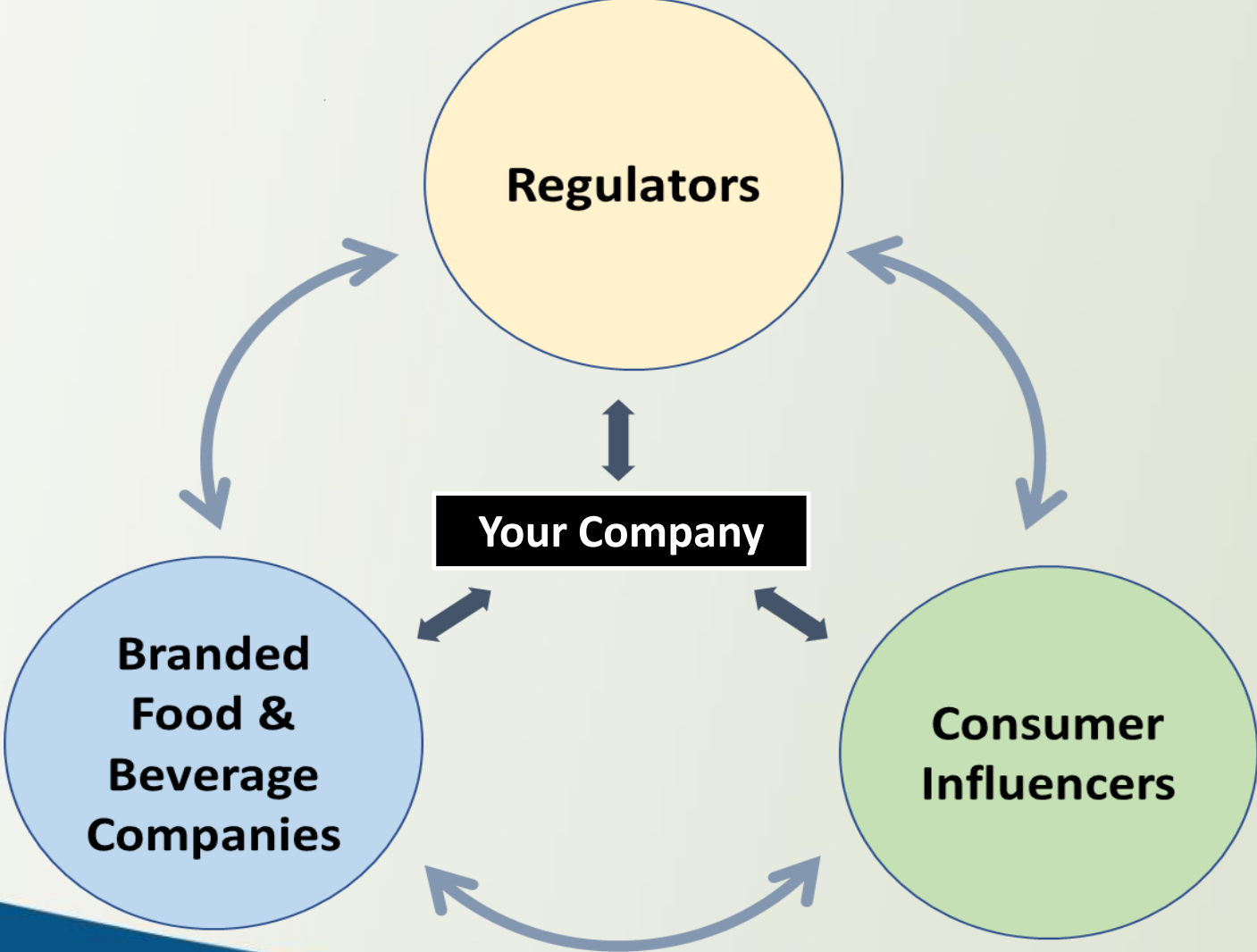
- Ruth MacDonald, PhD, RD, Chair and Professor of the Department of Food Science & Human Nutrition at Iowa State University

Total thumbs down on this article. Old wives tales endure centuries for a reason. I started leaving a cut onion on the counter when my son was 12 and neither of us had as much as a cold throughout until his graduation. Science doesn't have to "prove" anything to make me believe it works.

- Cindy Gable



Cycle of Continuous Influence



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Consumer Trends Reshaping the Market



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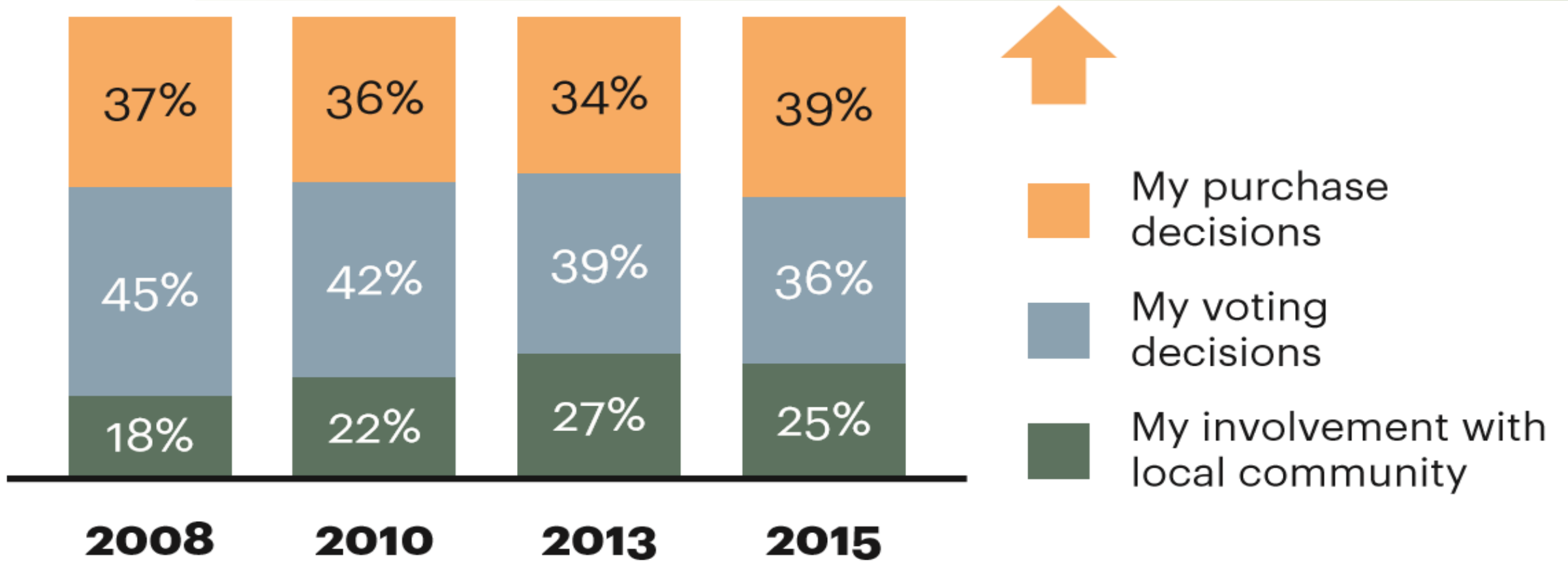
Macro Shifts

- **Who we are is changing:** There are fewer households with kids, more single-person households, more men are primary shoppers.
- **What we do:** We are eating alone and snacking more. Meal rituals are diminishing. We are increasingly turning to the food service sector to satisfy our food needs and wants.
- **How we shop:** Multi-channel shopping is now the norm; immediate consumption is rising.
- **What we value:** We live in a changing culture of health and wellness where fresh is the symbol of quality in food and beverage. There is greater appreciation for personalized, customized and global foods. FLP – Food Less Processed.



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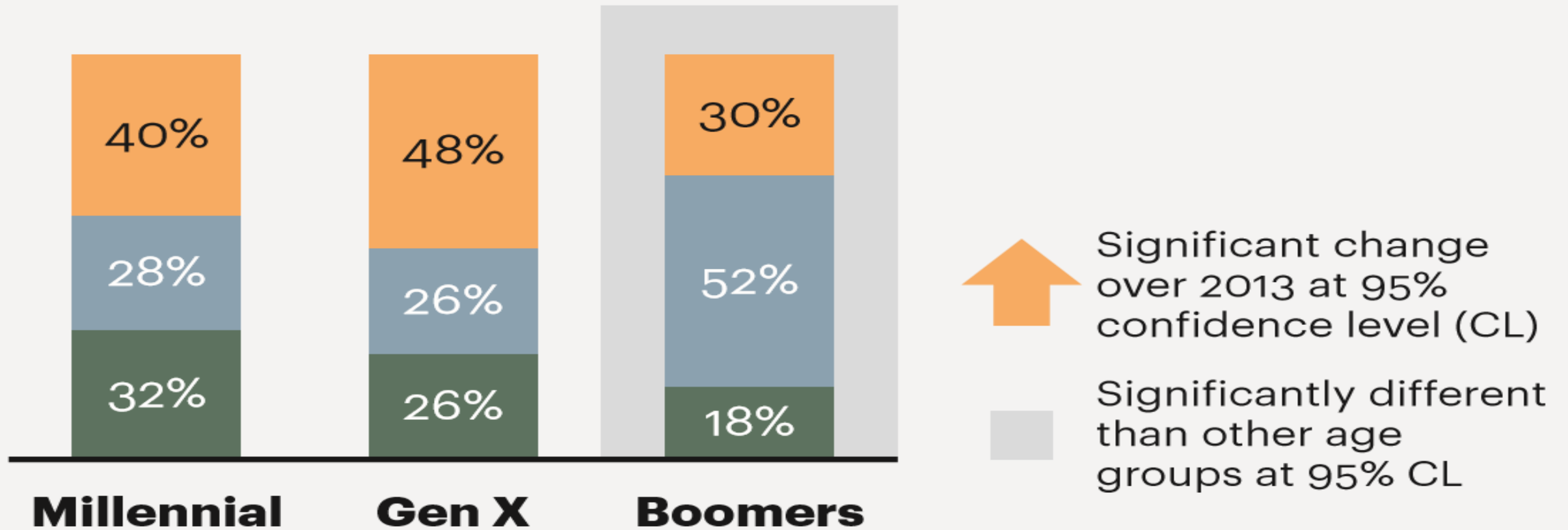
Greatest Impact on Society



Source: A.T. Kearney analysis

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Greatest Impact on Society by Generation



Source: A.T. Kearney analysis

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Transparency Means Business

“Consumers have begun to weigh a new set of factors more heavily in their purchase, disrupting the consumer value equation in ways that present both opportunities and challenges for the food industry.”



Source: Deloitte Food Value Equation Survey 2015, Deloitte Analysis

Key Trends to Watch

Trend	Trend description		2015 size (billion)	CAGR	Threat
Functional	Demand for foods with added health benefits is increasing	↔	\$98.0 (Global market)	7% ¹	
Private label	Private label sales are trending upward, particularly those with increased retailer investment	↔	\$85.1 (US retail sales)	5% ²	
Free-from	There is high growth in free-from market segments	↔	\$61.8 (Sum of US non-GMO, organic, gluten-free)	~21% ³	
Fresh	Demand for fresh foods is outpacing center store and processed foods	↔	\$18.6 (Fresh format)	12% ⁴ (Fresh format)	

Five Years

Source: A.T. Kearney analysis

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The Trends are Real

- Greater interest in diet and health
- Demand for greater transparency
- Desire for more “evolved” food (FLP)
- Greater interest in food safety, environmental impact, treatment of animals and workers, etc...
- Changes in who we are, what we do, how we shop, what we value
- Fundamental shifts in who we trust and where we get information
- Increased pressure on brands to drive social change through the supply chain
- Competition now is for share of wallet AND share of heart, mind and voice



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Consumer Trust Research Highlights



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What we've learned
about building trust

Trust Model (Sapp/Look East)

SOCIAL LICENSE



FREEDOM TO OPERATE

Trust research was published in the
Journal of Rural Sociology



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Social License

- The privilege of operating with minimal formal restrictions based on maintaining public trust.
- Public trust is based on a belief that your activities are consistent with social expectations and the values of your stakeholders.



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The Social License To Operate

Social License

Flexible
Responsive
Lower Cost

Guided by...

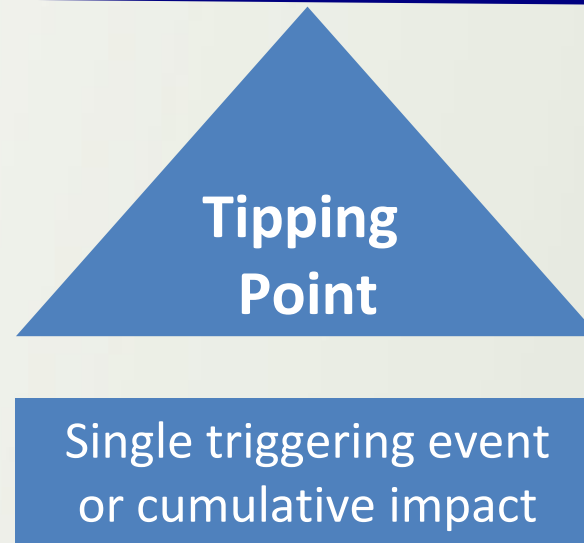
- Ethics
- Values
- Expectations
- Self regulation

Social Control

Rigid
Bureaucratic
Higher Cost

Guided by...

- Regulation
- Legislation
- Litigation
- Compliance



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Social License Challenge: Biotechnology

DANNON COMMITS TO TRANSPARENCY AND NON-GMO FEED FOR ALL ITS COWS



MAMAVATION

SB SUSTAINABLE BRANDS
The Bridge to Better Brands

News & Views

Library

Events

Members

Solution Providers

At

MARKETING AND COMMS

Sustainable Brands Issue in Focus

CHANNELS

Behavior Change

Leadership

Products & Design

Supply Chain

Marke

Non-GMO Commitment Earns 'Unfounded Accusations' from Farm Groups

November 3, 2016

Farm War Over Sustainability

Groups Push Back on Food Claims About GMOs, Farm Practices

Chris Clayton, DTN Ag Policy Editor
10/27/2016 | 4:19 PM CDT



Food companies are latching on to the sustainability movement and also trying to avoid labeling products as containing GMOs. The U.S. Farmers and Ranchers Alliance and other farm groups are pushing back on claims that declare GMOs are unsustainable. (DTN file photo)

OMAHA (DTN) -- Farm groups defending biotechnology are making it clear they have drawn a line in the sand against companies that convert product lines to non-GMO crops in the name of "sustainability."

Spearheaded by the U.S. Farmers and Ranchers Alliance -- a group funded by farm trade associations and industry partners -- ag organizations on Thursday announced a "straight talk" campaign to engage food companies about biotechnology and practices that should define sustainable agriculture. Farm groups also made it clear they intend to publicly call out food companies that criticize food produced with genetically modified organisms.

Farm groups have been trying for years to reverse the conversation and angst about biotechnology from at least some consumers. Yet food companies have increasingly opted to tap into that consumer ignorance on GMOs -- and avoid a future federal GMO disclosure law -- by reformulating products and promoting the brand as non-GMO. General Mills did so with Cheerios, as Hershey's has



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Social License Challenge: Public Health



HARVARD

SCHOOL OF PUBLIC HEALTH

Powerful ideas for a healthier world

Eating Red, Processed Meat Raises Your Risk of Early Death



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Social License Challenge: Animal Welfare, Environment



Walmart Pork Supplier Allegedly Caught Abusing Pigs In Graphic Undercover Video



INTERNATIONAL BUSINESS TIMES

When Pigs Fly: Drone Captures Rarely Seen Images of NC Pig Farms





Eating meat from Mexico could make you fail your drug test

Mexico's Bachoco pulls possibly contaminated meat from U.S.

Mexican Lawmaker: Factory Farms Are "Breeding Grounds" of Swine Flu Pandemic

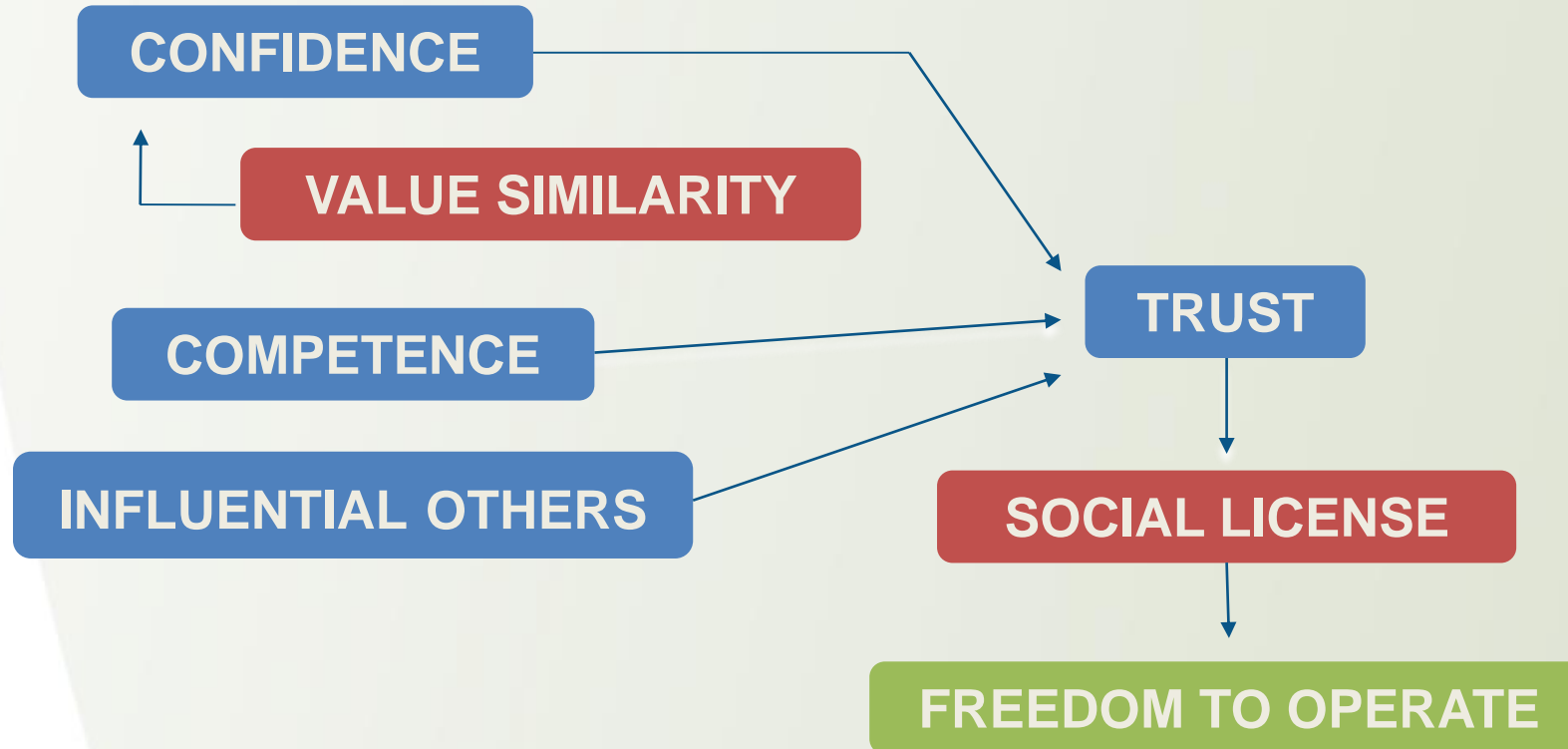
MEXICAN SLAUGHTERHOUSES

AN INVESTIGATION BY ANIMAL EQUALITY

Study finds horse DNA in 10 percent of meat in Mexico

Mexico's Foot-and-Mouth Disease Problem

Trust Model (Sapp/Look East)

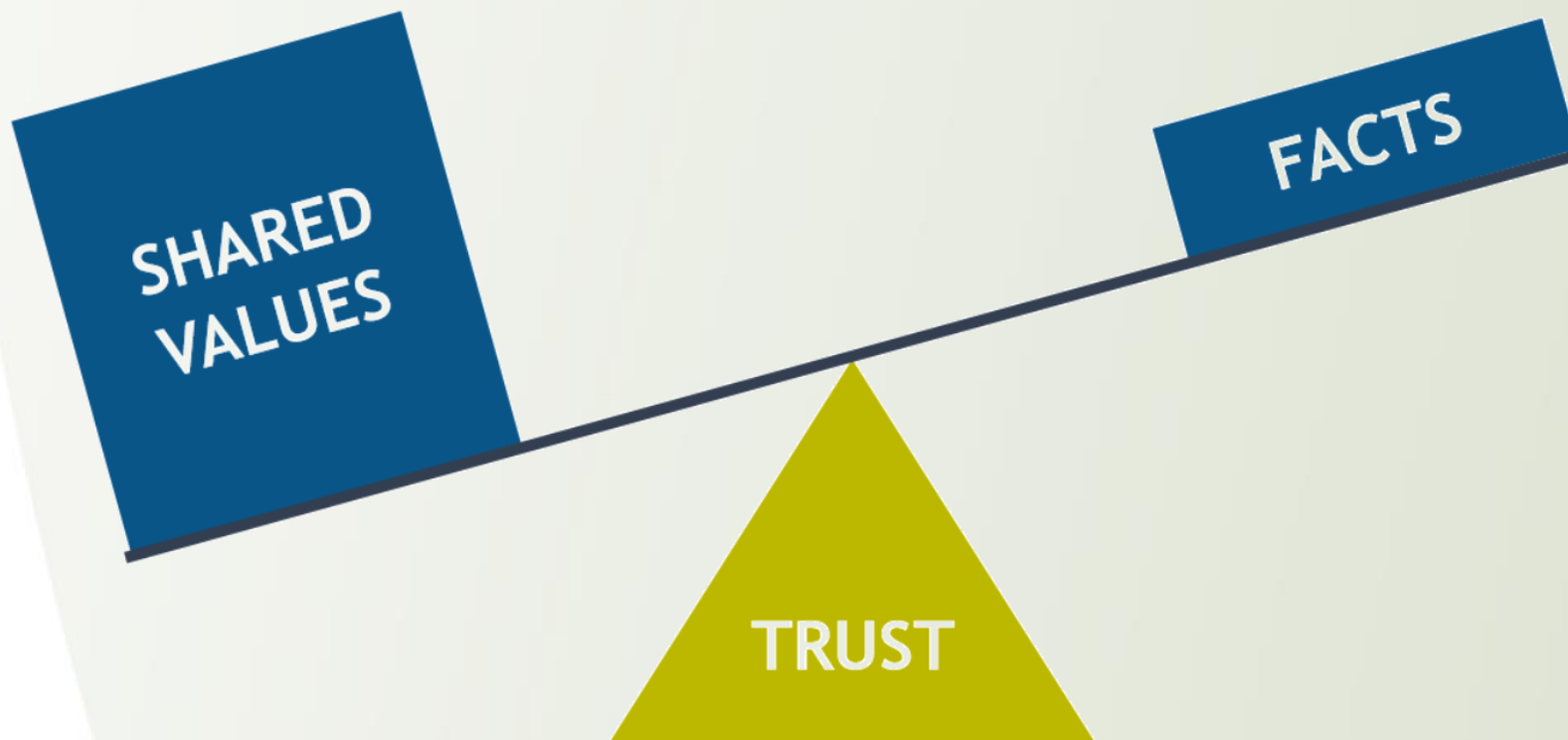


Trust research was published in the
December 2009 *Journal of Rural Sociology*



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What Drives Consumer Trust?



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



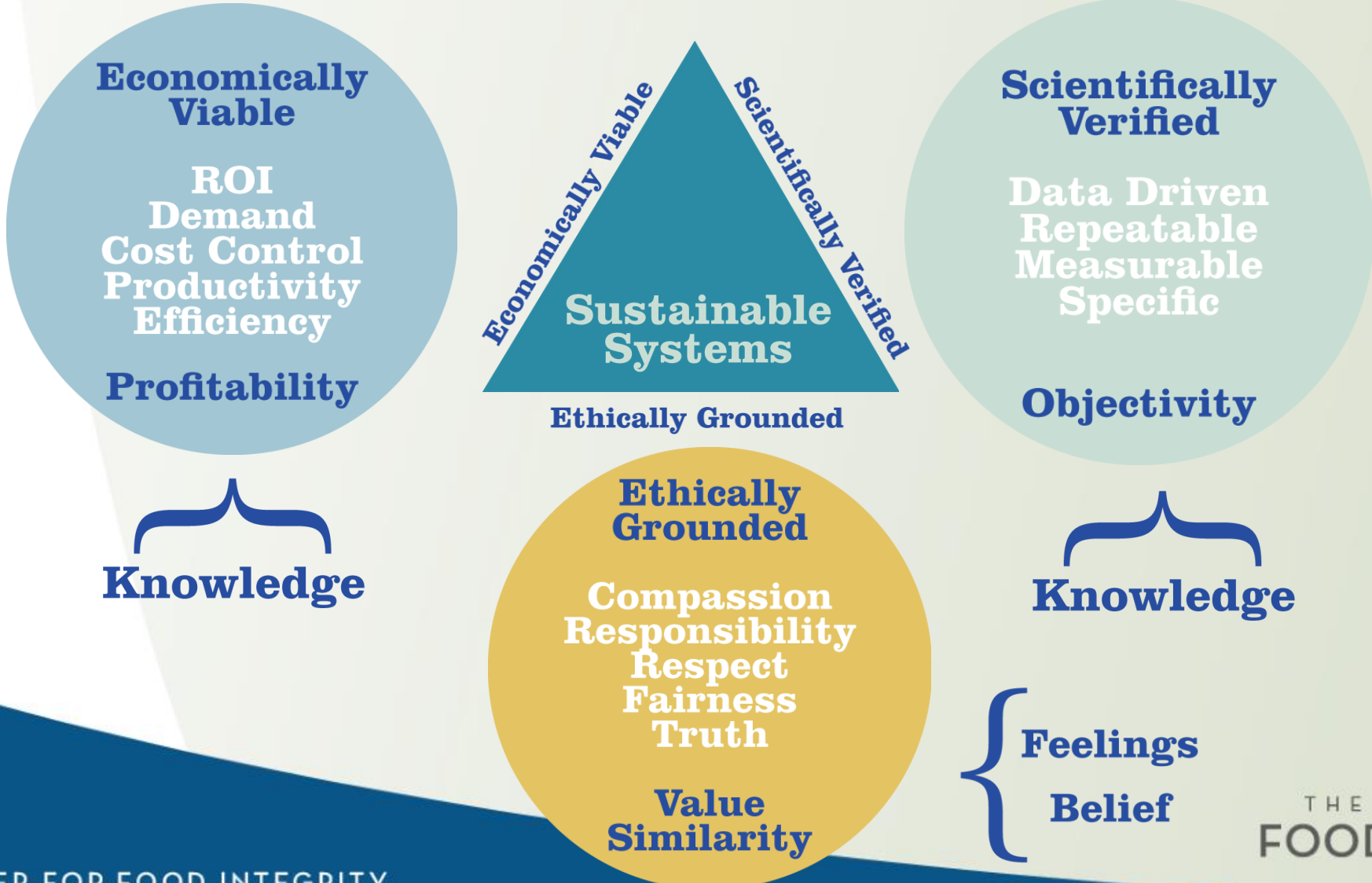
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**“No one cares how much you know,
until they know how much you care.”**

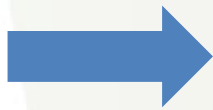
- Theodore Roosevelt

Sustainable Balance



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Historical Approach: Science and Economics



Research/science proves
it's ok to do this...



It improves productivity,
efficiency...



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Answering the Wrong Question

Should?



**ETHICALLY
GROUNDED**

**FEELINGS
AND BELIEFS**

Can?



**ECONOMICALLY
VIABLE**

**SCIENTIFICALLY
VERIFIED**

KNOWLEDGE



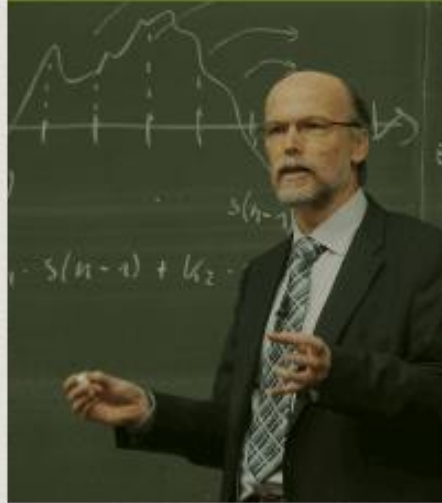
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**Don't abandon
science and facts**

**Lead with Shared Values
to Build Trust**



Scientific



Philosopher



Follower



Wishful Thinker



Existentialist



Connecting with Consumers in a Post-Truth Tribal World? Re-building Consumer Trust

Download Research Summary at FoodIntegrity.org

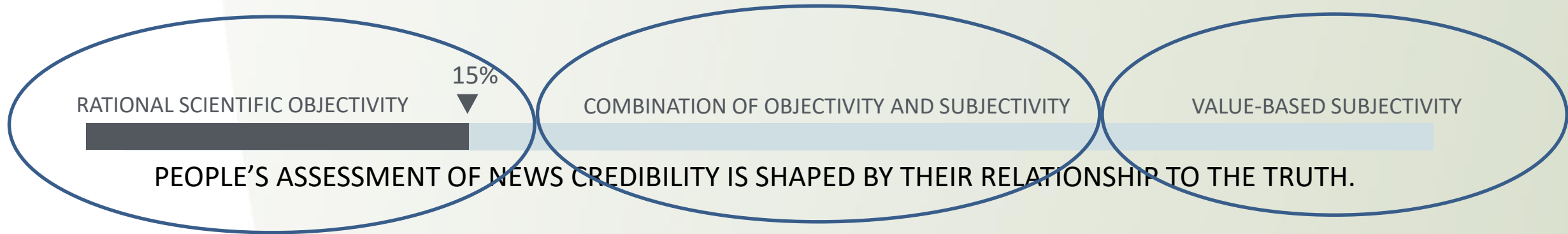


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Research Sponsors



The Belief Spectrum



On the left of the spectrum are people who understand truth as objective: a knowable fact that can be best observed through the scientific method.

On the right of the spectrum are people for whom 'truth' is subjectively determined (regardless of whether they realize it). For them, what makes information credible is more about what "feels true for me" based on deeply held beliefs.

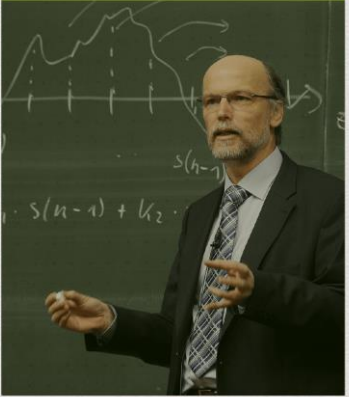
In the middle are people for whom truth is both objectively and subjectively determined. These consumers are often confused by the amount and the often contradictory nature of information, so they seek guidance from others to determine credibility.



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Food news is symbolic of...

Scientific



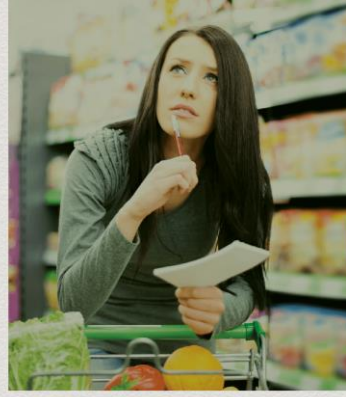
Complexity:
They love it, because they know nothing is simple or black and white.

Philosopher



Ethical rationality:
Seeing rational arguments in ethics, and what they consider being morally right – their opinion positions them on the “right” side of morality.

Follower



Confusion: It causes stress and anxiety and threatens one’s sense of being and self.

Wishful Thinker



Underlying aspirations: It confirms their dreams and hopes, and makes an objective seem attainable – e.g. Ongoing happiness.

Existentialist



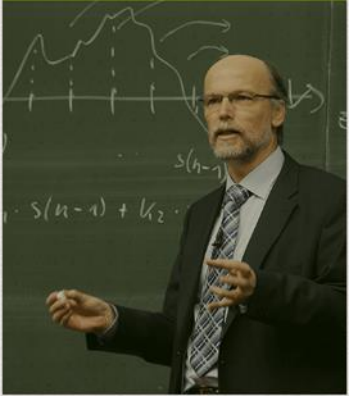
The ideological battlefield: It either prepares them when it confirms their ideas, or threatens them when it opposes.



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What makes food information credible?

Scientific



Scientific evidence, reasoned argument, complex discussion, citation of scientific studies, tentative conclusions.

Philosopher



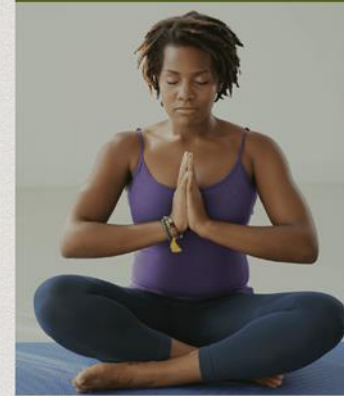
Broadly held social and ethical opinions along with citations of scientific studies, discussion of environmental, social and/or political context of the study or findings, acknowledgment of bias or shortcomings, independence (from food/agriculture lobbies).

Follower



Simple and clear messages, authoritative and official looking, actionable recommendations, personal or personified (i.e.: they can connect to the person giving the information).

Wishful Thinker



Big and promising claims and answers to problems, personal testimony, connection to spirituality, challenges to the status quo. News that plays on their fear or worries is also effective.

Existentialist

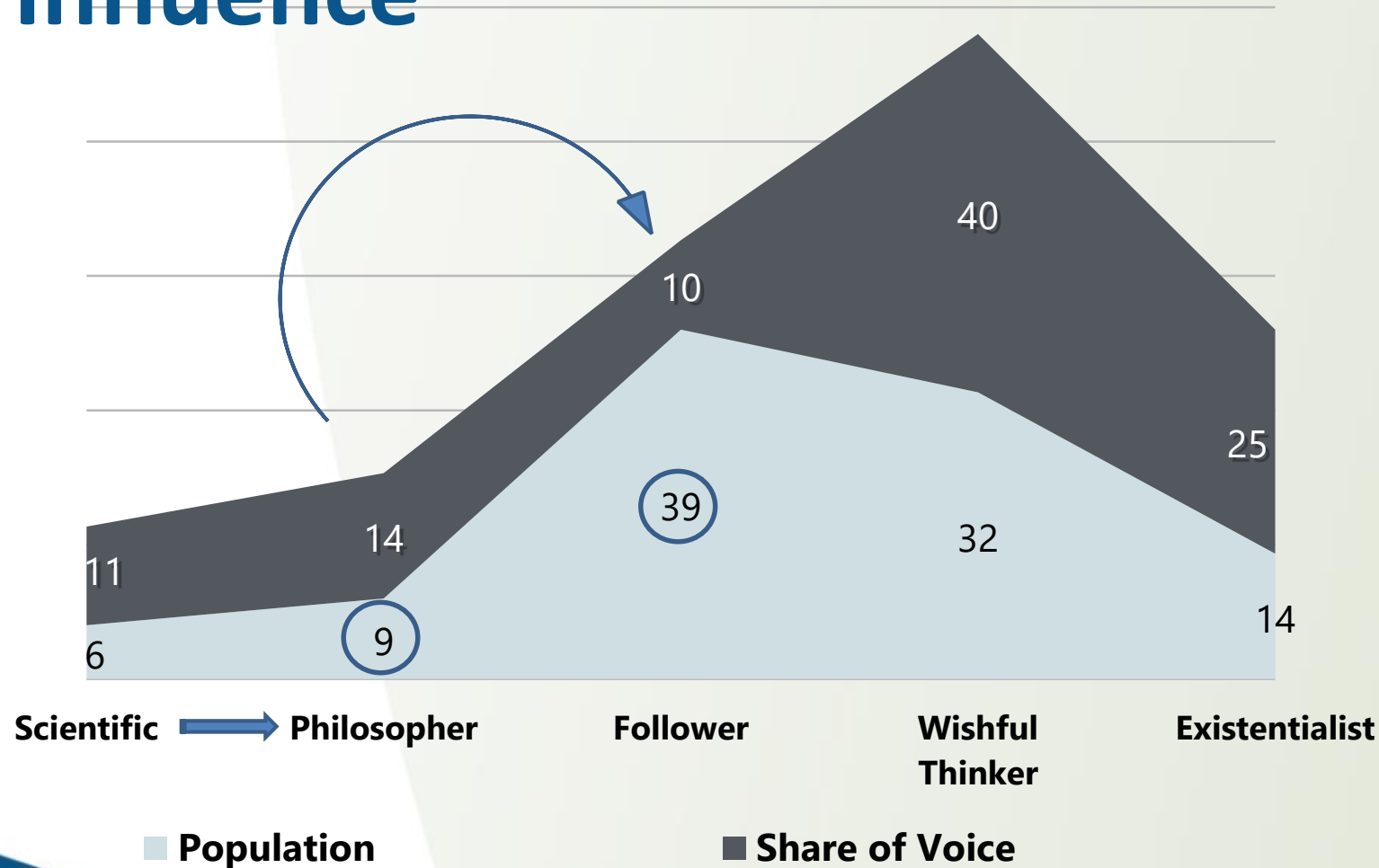


Information that validates their existing preconceptions about food, health, as well as the broader social/ political landscape. News and information (often from niche sites) that is shared by their virtual communities of like-minded people.



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Influence



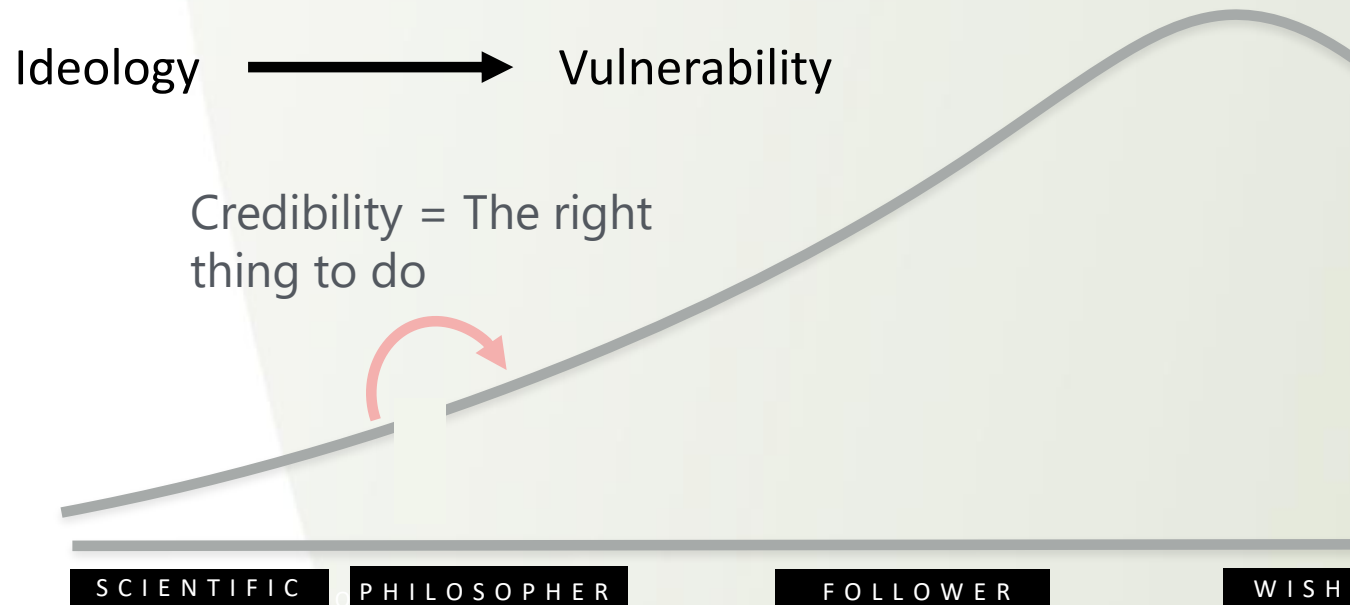
Scientifics are the technical information pioneers in food news. They drive the standard of scientific claims that others evaluate. They are technical pioneers, but not the culture creators. Their lack of clarity and inability to simplify conversations limits their influence to Philosophers.

Philosophers represent the culture creator in the category.

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Chasm Analysis

How the culture of food news and information is changing.



Philosophers assess evidence through a simple, clear ethical lens. This influences the Follower.

Followers fear doing the wrong thing, and jeopardizing the health of their families. They look towards Philosophers, and other Followers, for advice that's simple to understand, and that *feels* right – because it's ethically or morally the right thing to do.



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Strategic Opportunities

- **Inputs: Guide Our Strategy**

- Four factors that make our information relatable to the Follower.

1. Knowing that the source is knowledgeable yet “I can understand them.”
2. They clearly tell me what I should do, given my life’s situation.
3. They themselves have similar responsibilities (family, community, maybe the environment).
4. Their guidance just *feels* like the right thing to do – is ethically and/or morally sound advice.

Follower



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Strategic Opportunities

- **Inputs: Guide Our Strategy**

- Approach: Ethical rationality.
- Opportunity to leverage other parents, farmers, wives and husbands to deliver ethically rational arguments.

(Academics who are relatable have the advantage of credible expertise – not a company or trade association – and the ability to connect.)

Follower



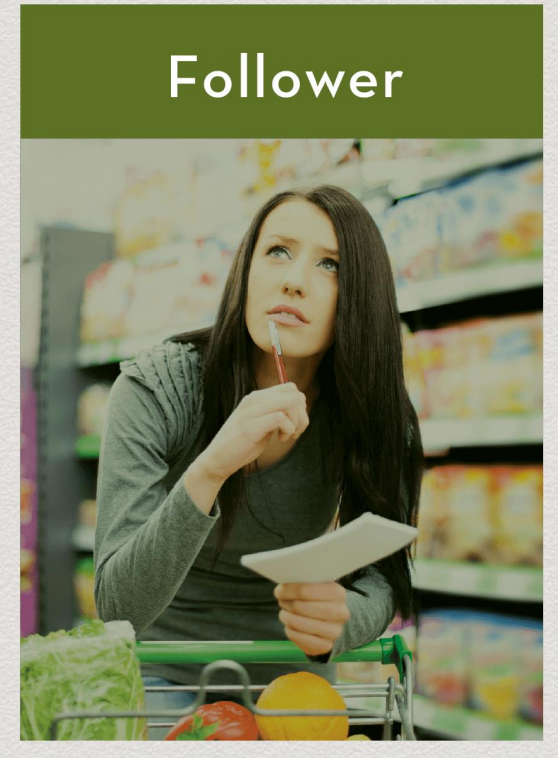
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Strategic Opportunities

- **Outputs: What We Deliver**
 - Simple and easy to understand.
 - Visualizable arguments.
 - How-to or what-to-do.

Most important: You're giving Followers the comfort of knowing that they are doing the right thing.

Permission to believe



Follower



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Three-Step Formula for Evolving Beliefs

1. The messenger needs to be an expert Followers trust.

(Relatability = shared values + competency)

2. The message should be unambiguous and deliver a simple solution.

3. The message should address a specific vulnerability of the Follower. Followers fear they will miss something or do the wrong thing, thereby jeopardizing the health of their families or themselves.

Follower



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Tools for Building Trust

learnmore@foodintegrity.org



Coalition for
Responsible Gene
Editing
in Agriculture



A Clear View of Transparency

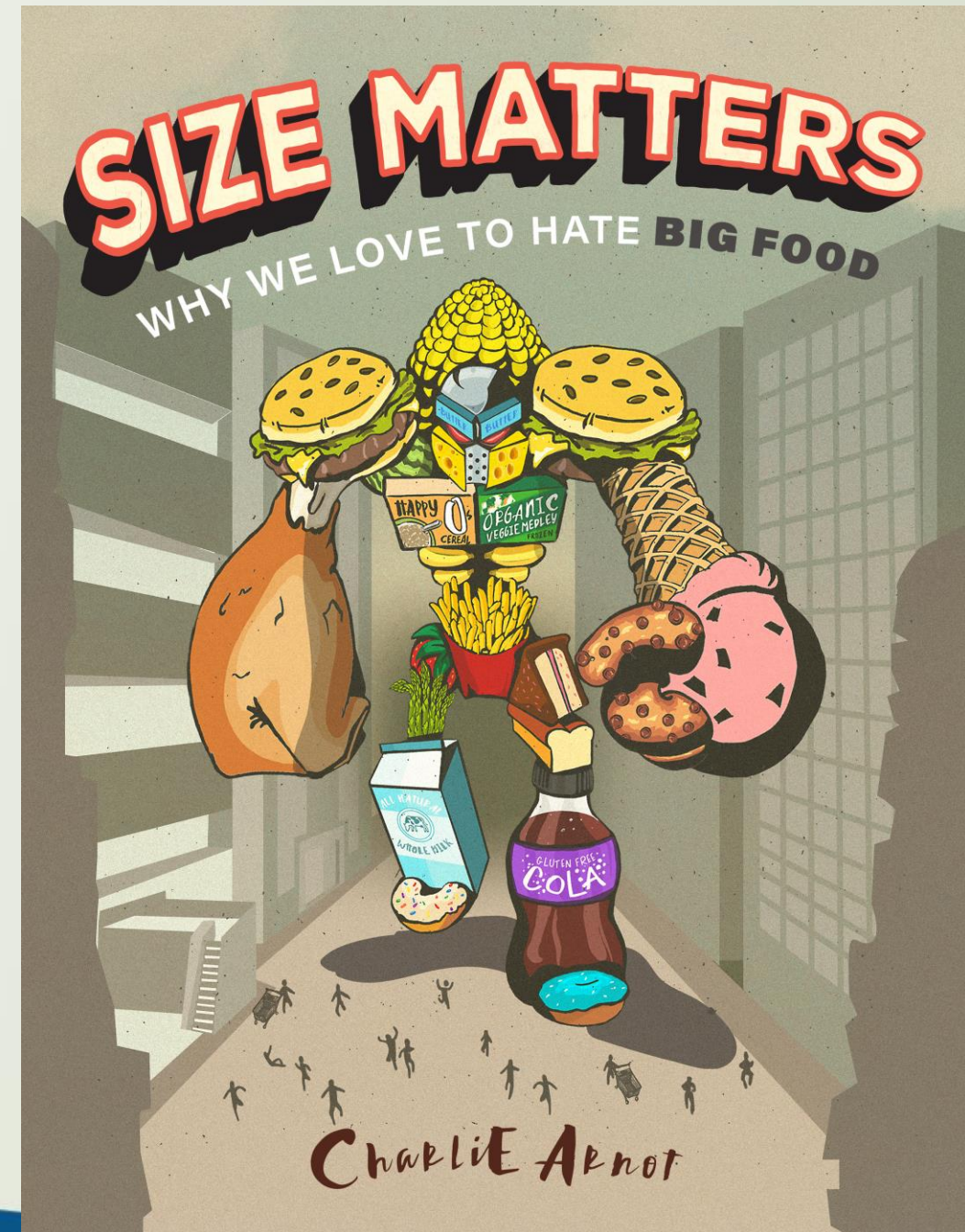


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Shameless Self-Promotion

Despite food being safer, more affordable and more available than at any time in human history, consumers are increasingly skeptical and critical of today's food system. In *Size Matters*, Charlie Arnot provides thought provoking insight into how the food system lost consumer trust, what can be done to restore it, and the remarkable changes taking place on farms and in food companies, supermarkets and restaurants every day as technology and consumer demand drive radical change.

Print and digital editions available later this spring



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