

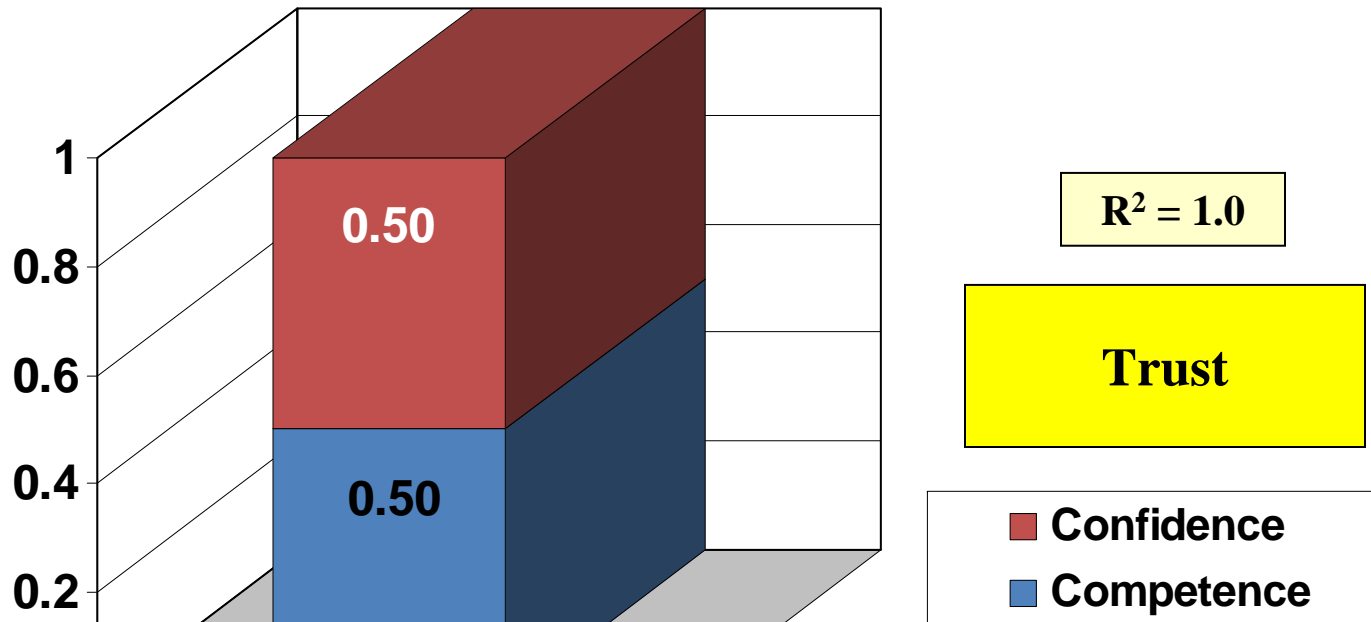
What Drives Trust?

Confidence and Competence



Consumer Trust Modeling

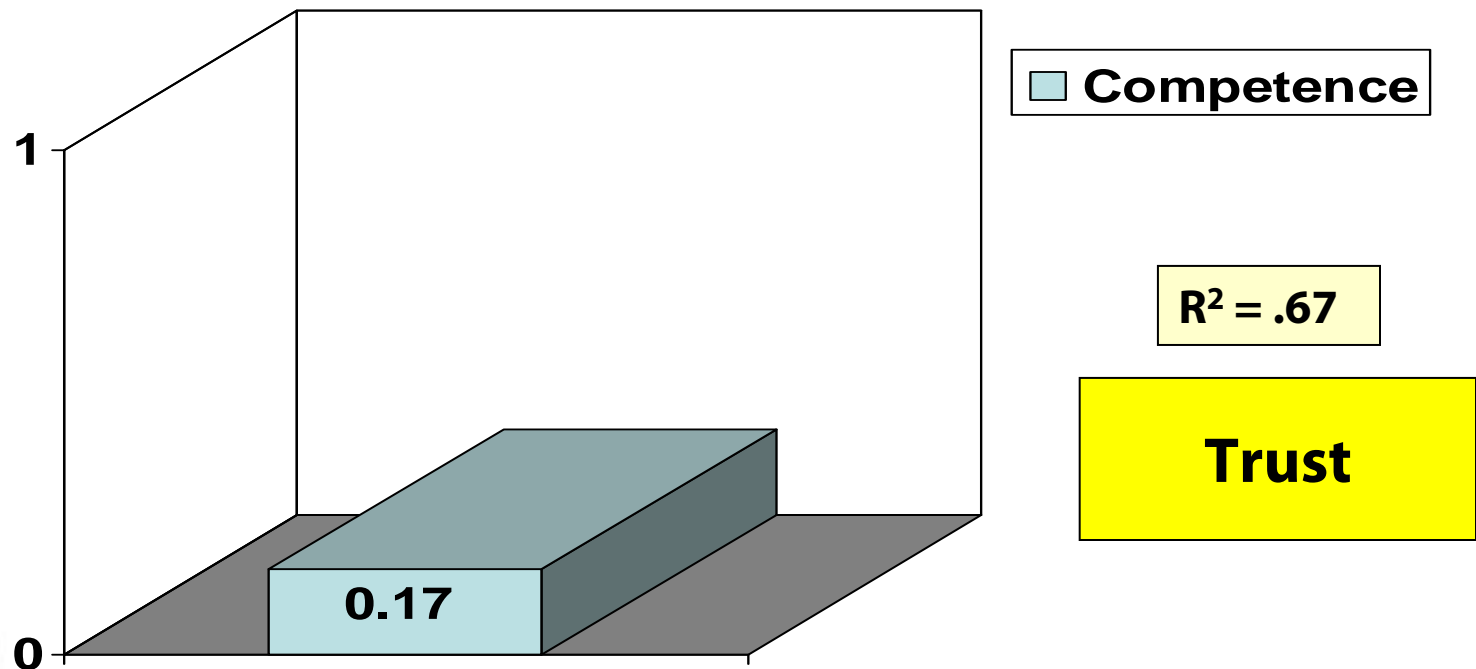
- R^2 represents the percentage of explained variance in the model
- Values greater than .30 are considered significant by sociologists
- Numbers in blocks represent the percentage of R^2 variance explained



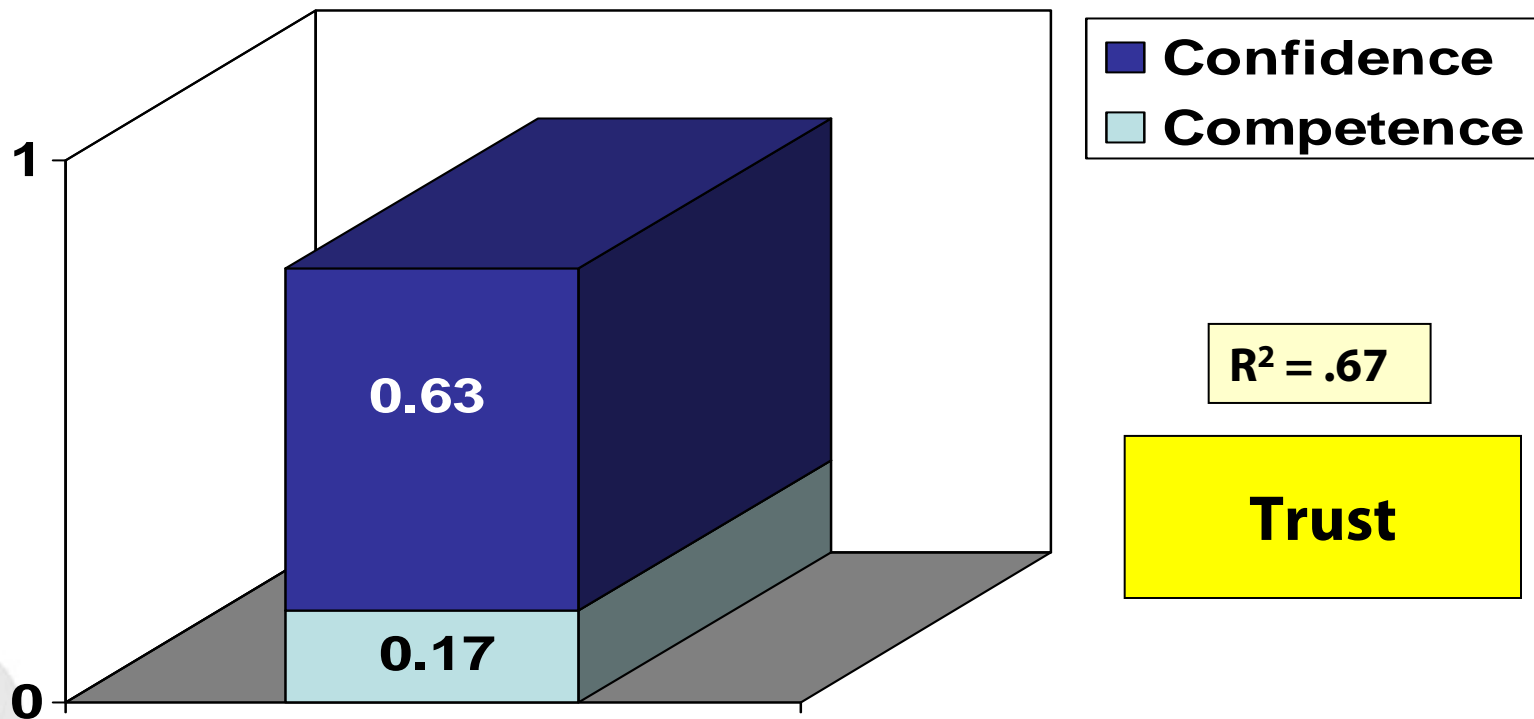
CMA, Consumer Trust in the Food System Study, October 2007



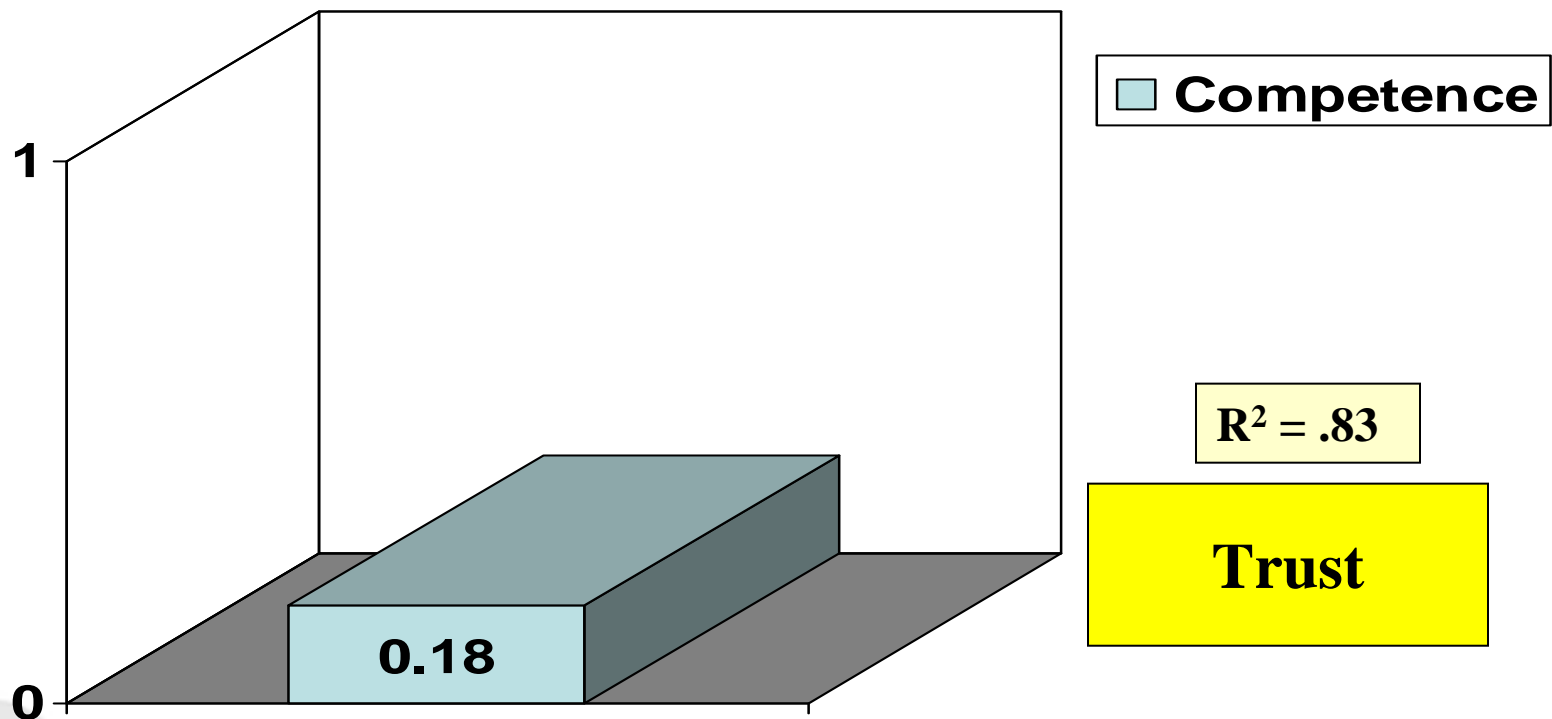
Drivers of Consumer Trust in Farmers and Producers – Food Safety



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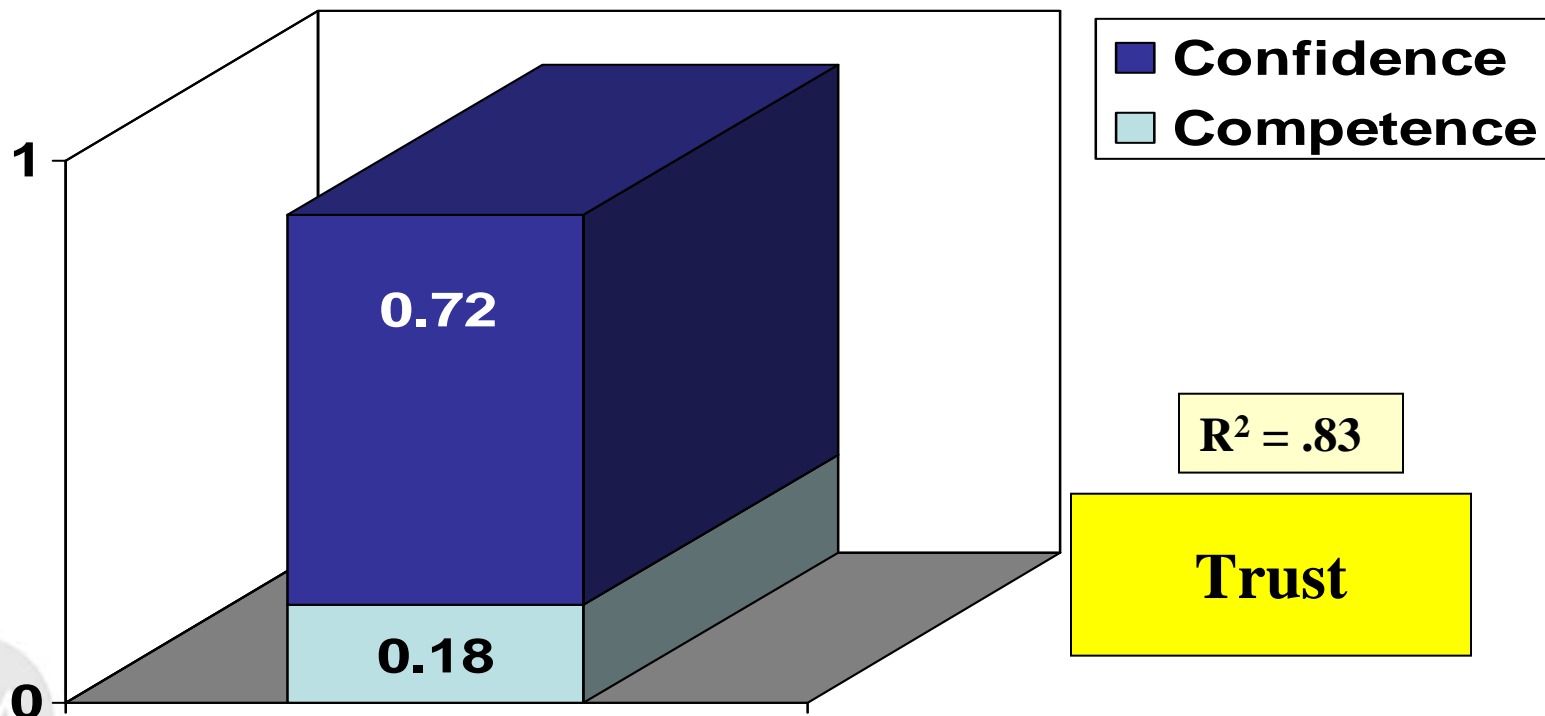


Drivers of Consumer Trust in Farmers/Producers to Protect the Environment



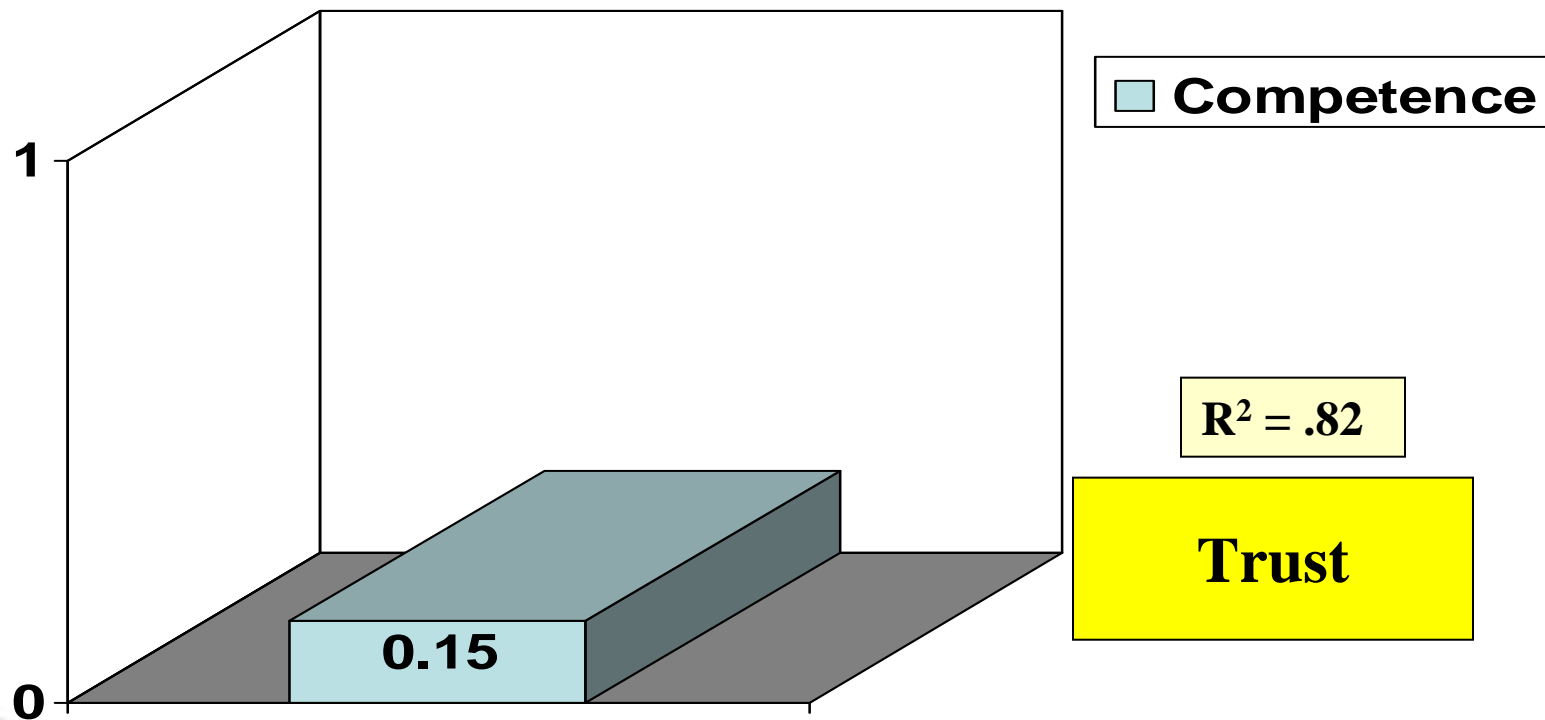
CMA, Consumer Trust in the Food System Study, October 2007

Drivers of Consumer Trust in Farmers/Producers to Protect the Environment



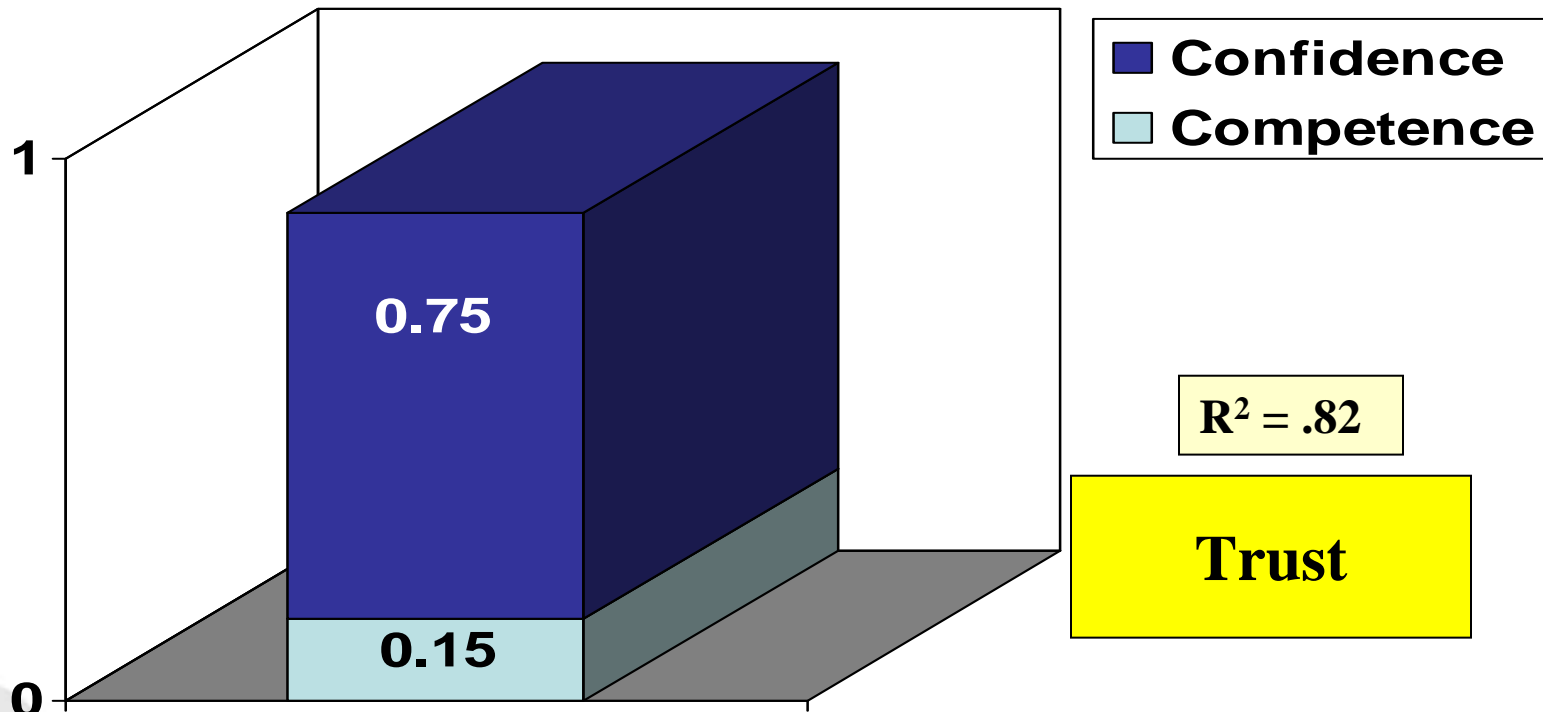
CMA, Consumer Trust in the Food System Study, October 2007

Drivers of Consumer Trust in Farmers/Producers to Ensure the Humane Treatment of Farm Animals



CMA, Consumer Trust in the Food System Study, October 2007

Drivers of Consumer Trust in Farmers/Producers to Ensure the Humane Treatment of Farm Animals



CMA, Consumer Trust in the Food System Study, October 2007

What does it mean?

“They don’t care how much you know until they know how much you care!”



Consumer Trust Research

August 2008



This information is wholly owned by CMA and licensed to CFI; Study was conducted by Gestalt Inc.



Methodology and Design

- Survey Sampling International Inc. consumer Web panel recruiting
 - World leader in Web-based surveys
- Total of 2066 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



Mean Summary of Concerns About Issues

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

(n=2066)

0=No concern

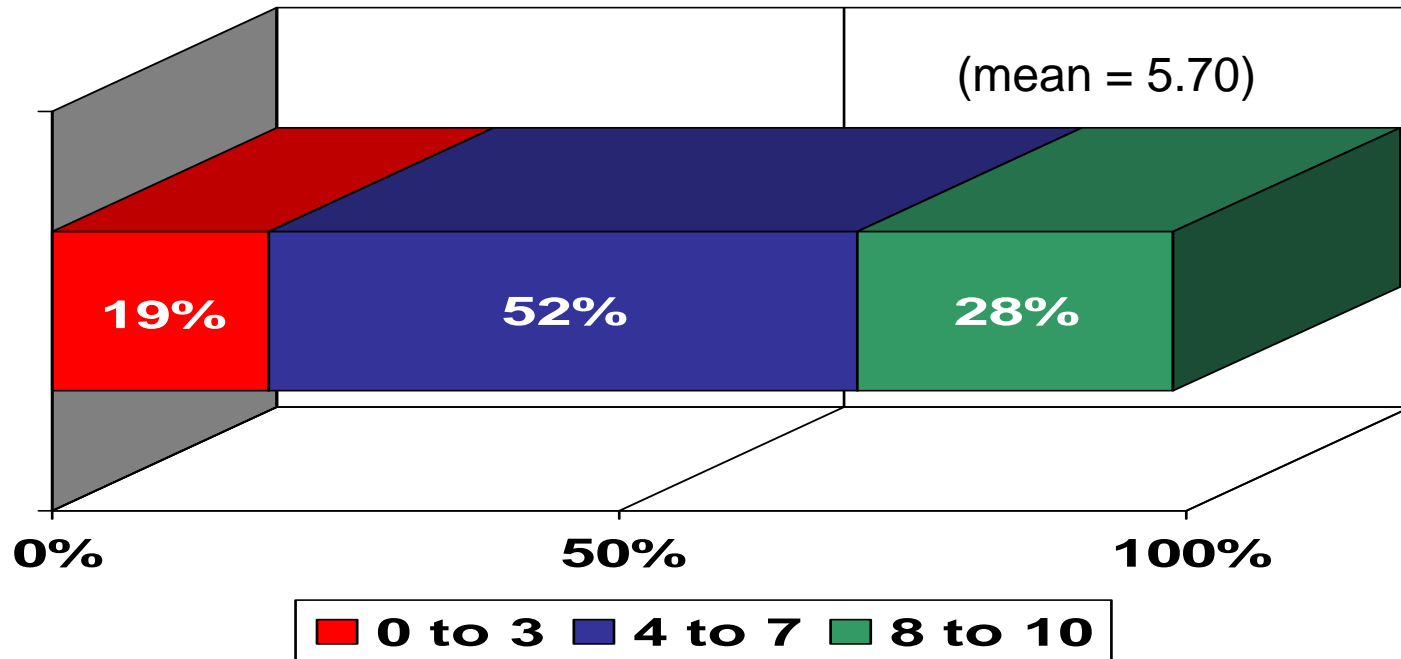
10=Very concerned



Food Safety



I am confident in the safety of food I eat.

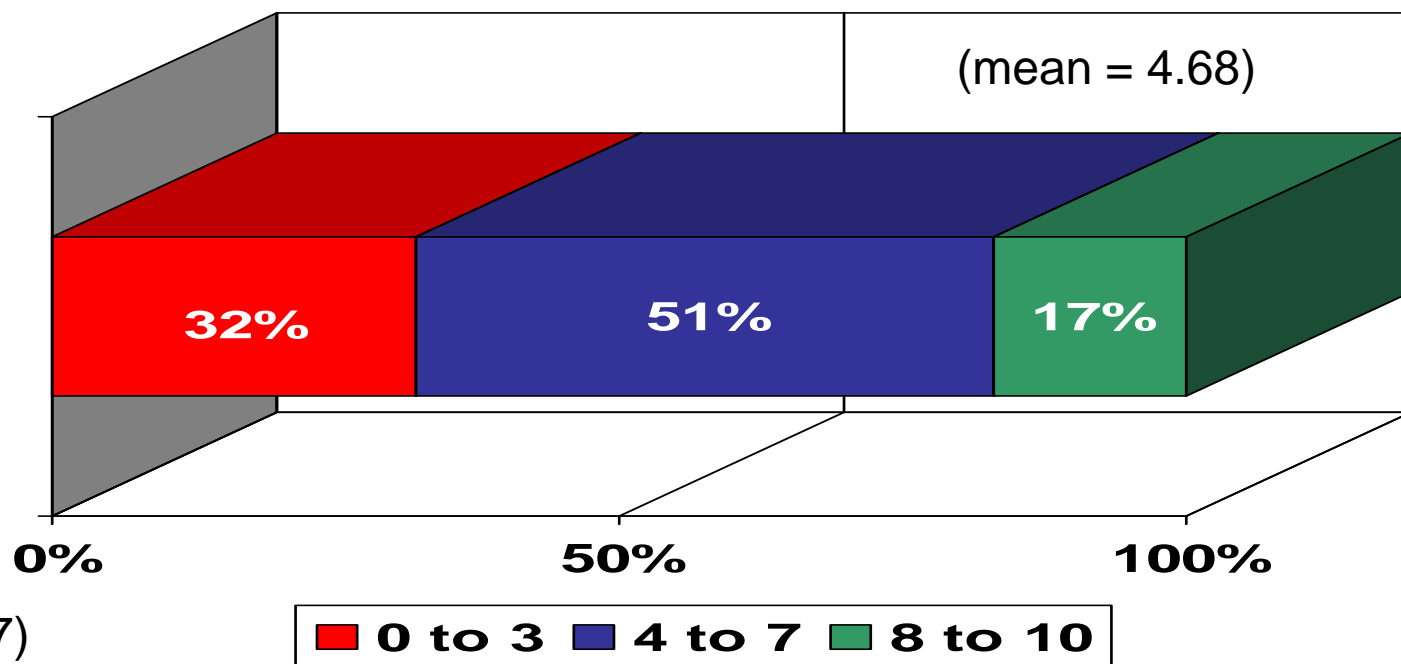


(n=1027)

(mean -.23) Significantly lower than last year



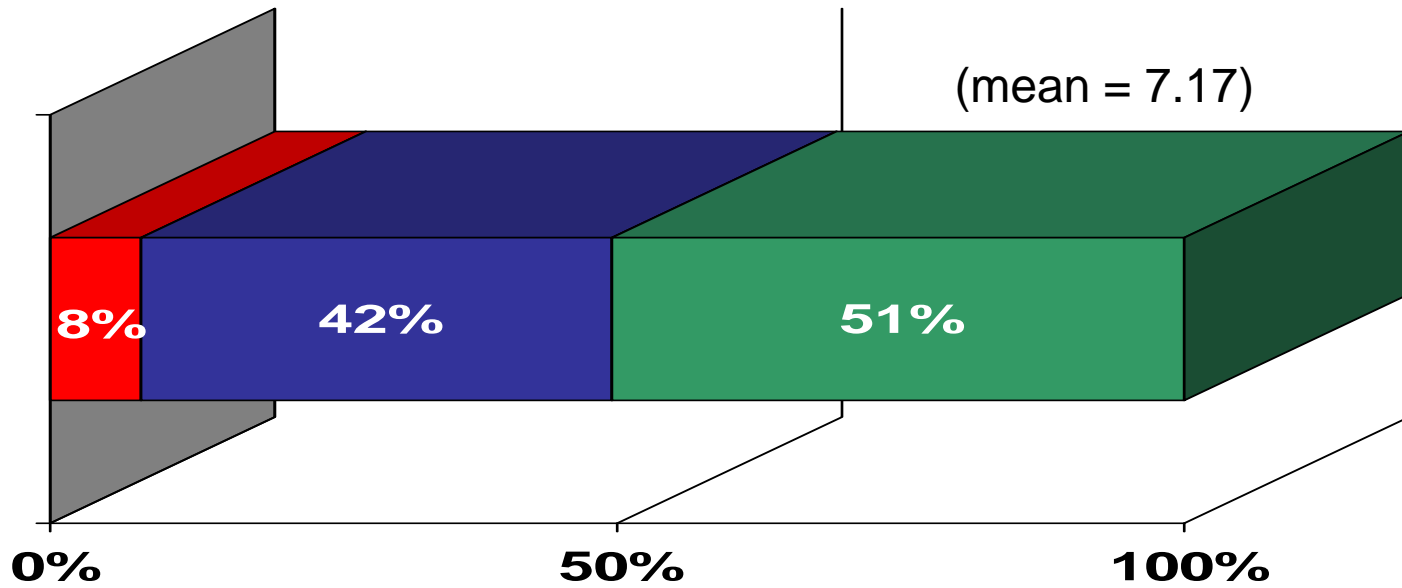
Government food safety agencies are doing a good job ensuring the safety of the food we eat.



Question not asked in 2007



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



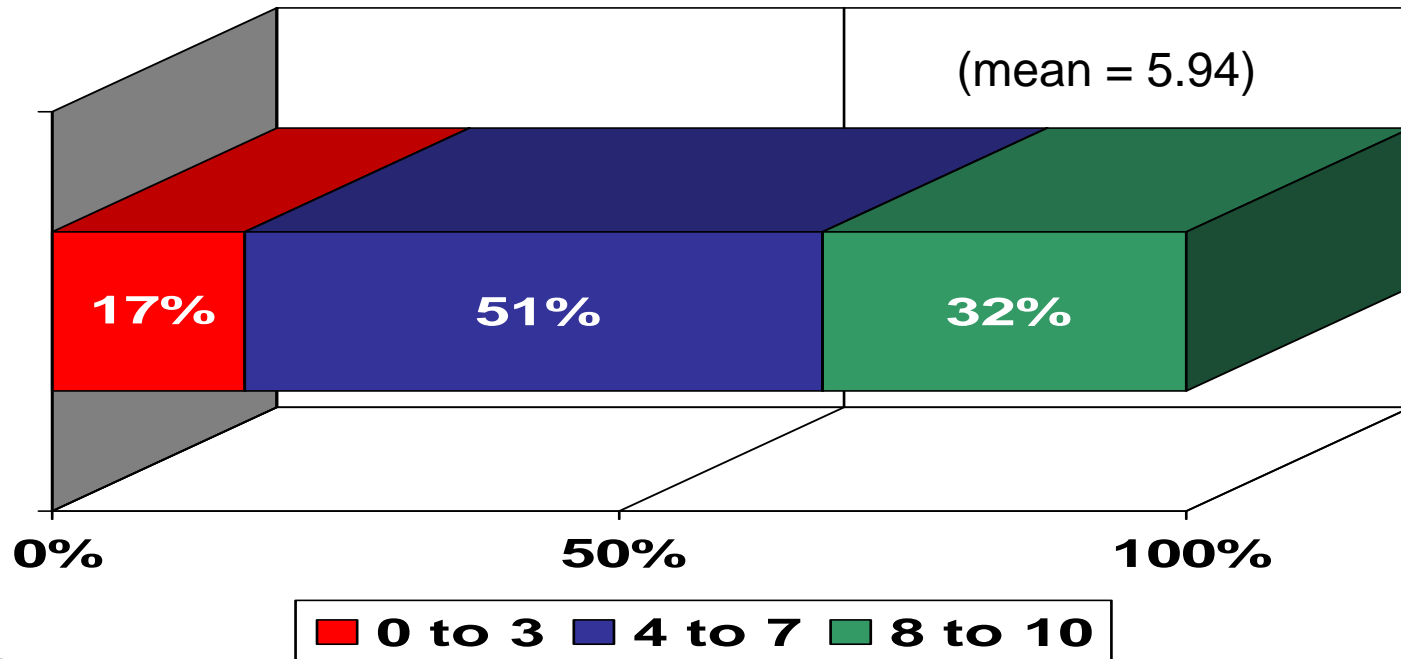
(n=1039)

■ 0 to 3 ■ 4 to 7 ■ 8 to 10

No significant difference from 2007



U.S. food is amongst the safest in the world today.

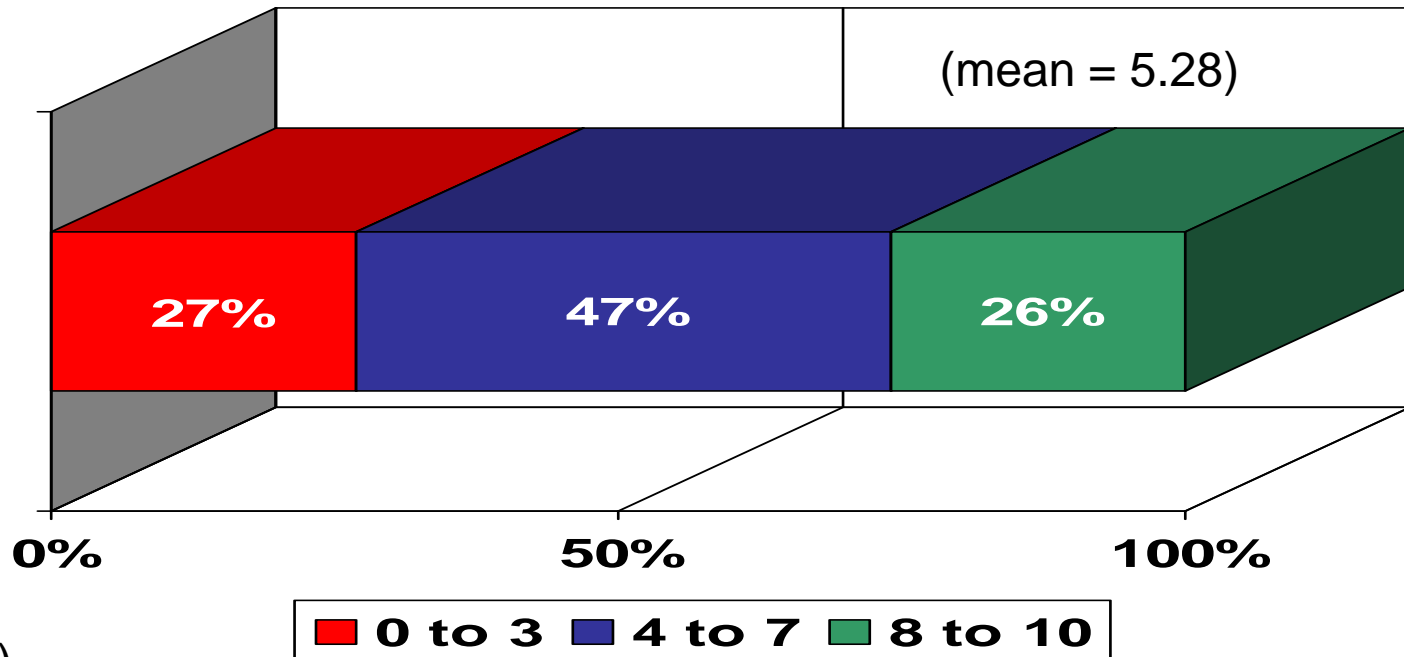


(n=1027)

(mean -.41) Significantly lower than last year



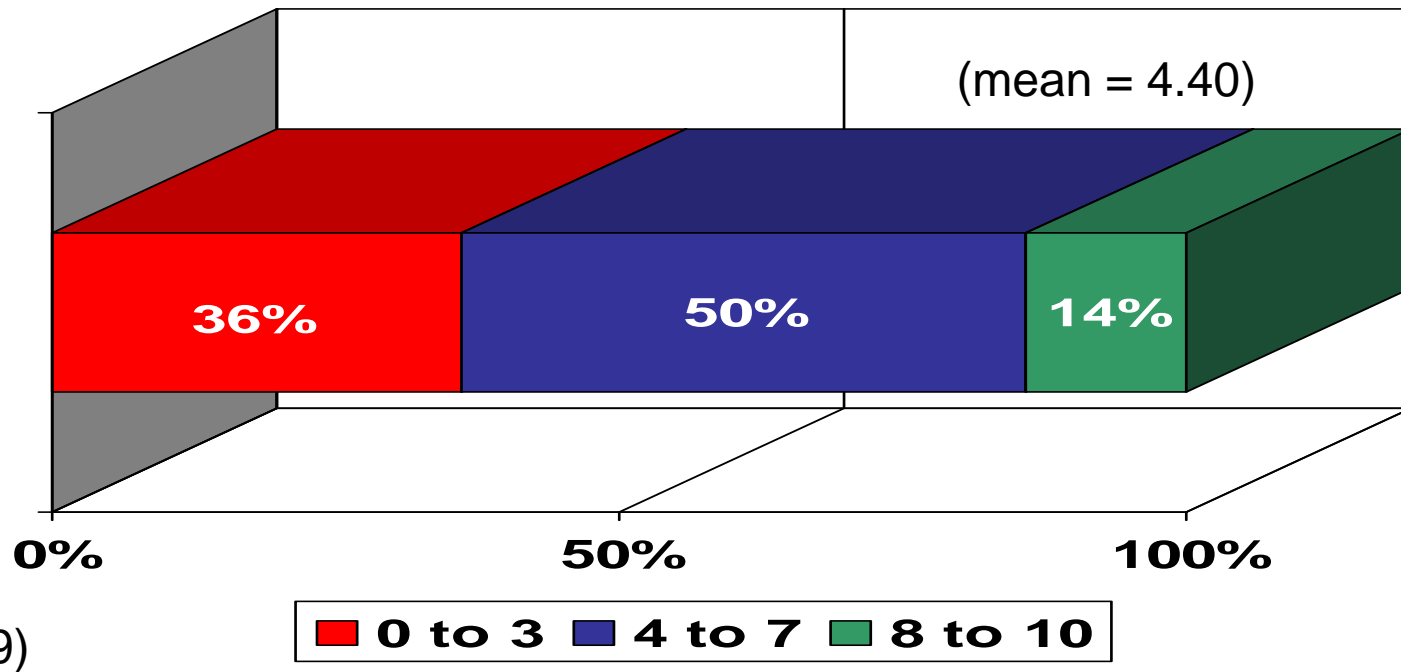
I am as confident in the safety of the food I eat as I was a year ago.



(mean -.27) Significantly lower than last year



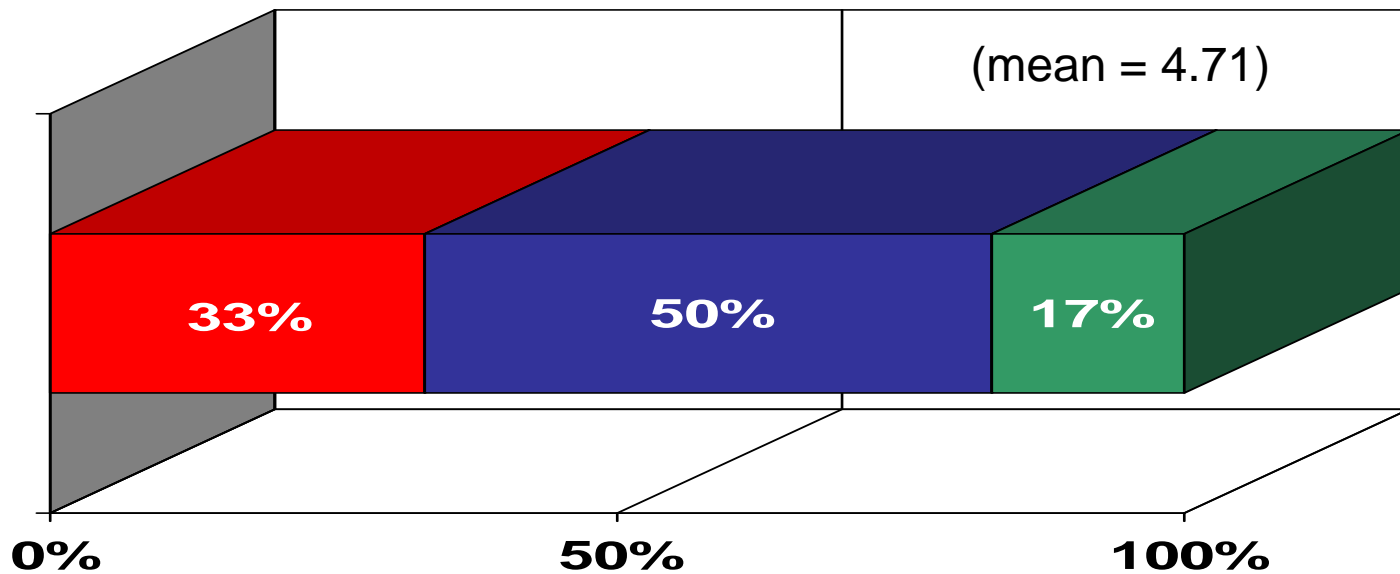
Today's food supply is safer than it was when I was growing up.



(mean -.53) Significantly lower than last year



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



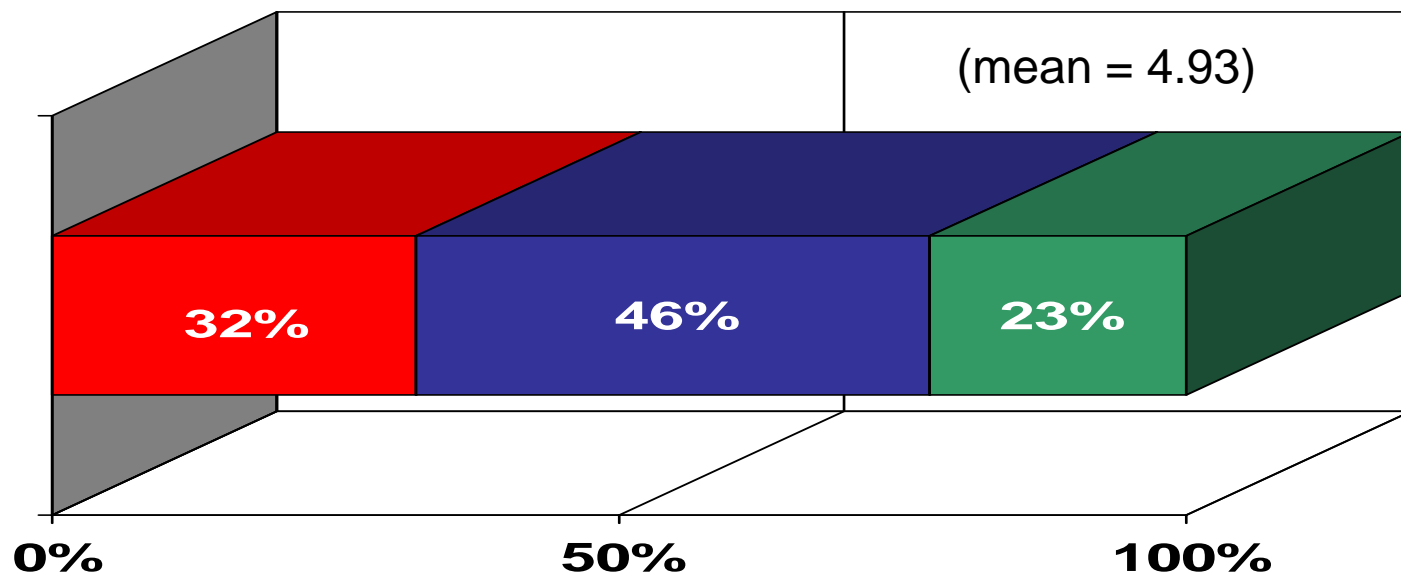
(n=1039)

■ 0 to 3 ■ 4 to 7 ■ 8 to 10

No significant difference from 2007



I don't care where my food was produced as long as it is affordable, safe and wholesome.



(n=1039)



(mean + .21) Significantly higher than last year



Key Takeaways – Food Safety

- Farmers/Producers & Food Companies/ Processors have the highest responsibility.
- Consumers trust ranking:
 - Themselves and the people who prepare their food at home
 - Farmers/Producers
- Shared values are 5X more important than technical skills.
- Consumer willingness to grant social license regarding food safety varies between and within groups in the food system.
- Consumer trust in food safety is decreasing.

