



general population or a specific group feel, think or act in the same way and to test messaging and programs that build consumer trust.

In order to properly target their quantitative survey, CFI looked for models that others had used to successfully introduce new ideas or innovation. CFI found research by Everett Rogers at ISU describing the adoption diffusion of innovation, a model introduced in 1962 that has been used around the world to introduce new concepts and products.

Within the Rogers model there are five identified adopter segments in a general population based on behavior: innovators, 2.5%; early adopters, 13.5%; early majority, 34%; late majority, 34%; and laggards, 16%.

“The majority of consumers want permission to believe that food is being grown, processed and brought to market in a way that is consistent with their values,” Arnot said. “For this group, the early and late majority, food system issues are not top of mind, and their concern is usually driven by the opinions of others or something they have seen in the media.”

Knowing who to ask

The Rogers research found that early adopters are the opinion leaders and drivers of social change. They are better educated, have a broader social circle and are active information seekers. For food system issues, CFI research did show a significantly higher percentage of early adopters for animal welfare, nutrition and food safety, and that early adopters for food system issues are more likely to be women.

Adopter categorization is issue-specific, Arnot said. “In other words, I might be an early adopter for food system issues,” he asserts, “but a late majority on technology.” Early adopters are the people CFI wanted to target for their quantitative survey, because this is the group that would more likely be interested in food system issues and would be seeking information in order to have informed opinions.

Survey respondents were asked to select from five statements the one that best described their attitude and approach to a specific issue. Those statements were correlated to the adopter segment, so respondents identified their adopter segment by their response to the question, Arnot explained. The quantitative study was conducted online in August 2010. A pool of 2,002 respondents took the survey.

“The research indicates consumers feel information from a nongovernmental organization is significantly more credible

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Seeing the two press releases within a little more than a week of each other could have caused some confusion in the agricultural community. The Center for Food Integrity (CFI) stated in a Sept. 27 news release that 95% of consumers who had visited www.farmersfeedus.org and consented to be surveyed said they found the farmers profiled on the site “knowledgeable, approachable and the kind of people I want producing my food.”

Then, in an Oct. 6 CFI release and a speech to attendees at the Food System Summit in Chicago, Ill., CEO Charlie Arnot reported survey findings that included the news that early adopter consumers rate the Humane Society of the United States (HSUS) as the most credible source for information about farm animal care.

In addition to the 15.88% of respondents who believed HSUS to be the most credible source of information about farm-animal care, Arnot said 12.32% ranked farm animal veterinarians as credible sources, 12.02% thought U.S. Department of Agriculture (USDA) representatives were credible, while 11.47% ranked People for the Ethical Treatment of Animals (PETA) as credible. Farmers operating large livestock operations were ranked last, at 5.5%.

How could that be? How could the first survey have that many consumers positive about farmers and agriculture if a combined 27.35% trust animal rights organizations more than farmers, particularly those associated with large livestock farms?

Knowing what to ask

Questioned about the two surveys, Arnot explained the differences in the methods used to develop the surveys and target different consumer segments. While discussing the surveys, Arnot described the process as an iterative approach, learning from each step and building on it.

“The first two years we benchmarked attitudes and measured who consumers trusted and who they held responsible for

food safety, nutrition, animal welfare and sustainability,” he said.

CFI conducted research in partnership with sociology professor and researcher Stephen Sapp at Iowa State University (ISU). The ISU study model was peer-reviewed and was published in the December 2009 edition of *The Journal of Rural Sociology*.

Based on more than 6,000 consumer surveys conducted over three years on issues such as animal welfare, food safety, and nutrition and sustainability, the ISU study identified three elements that influence trust: 1) influential others; 2) competence; and 3) confidence. The study found that confidence, or shared values, was three to five times more important than competence.

Agriculture groups understandably focus on science and technology to explain the growing size of farms and the full range of farming practices, but techniques, statistics and economies of scale are not as important to them. It comes down to the old adage, Arnot said, “They don’t care how much you know until they know how much you care.”

Qualitative research (focus groups and in-depth interviews, among other methods) can ask the “why” questions concerning issues, and can give insight into people’s attitudes, value systems, concerns, motivations or lifestyles.

“What we heard in our qualitative focus groups was ‘I trust farmers, but I’m not sure that what you are doing today is still farming,’” Arnot explained. In the same focus group research, when asked to describe a large farm, consumers rarely exceeded 100 acres or 100 animals.

“Early adopting consumers are deeply skeptical about today’s food system and don’t believe that improvements in technology and productivity have improved food safety, nutrition, animal welfare or agriculture’s impact on the environment,” Arnot asserted.

Researchers build upon the insights into people’s thoughts and feelings from qualitative research to develop quantitative surveys to measure “how many” of the

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than a group that profits from the meat industry,” Arnot said. “The closer you are to the money, the less credible your information.”

According to the CFI study, early adopters want information from unbiased sources they believe to be credible. Having a financial interest in the information or outcome of an issue reduces credibility among early adopters, Arnot said. This was true for all businesses, not just farming. Early adopters generally believe in the credibility of academics because they are knowledgeable and don't have a specific financial interest in the information. For the same reason, veterinarians and nonprofit organizations are also believed to be more credible.

Focus on education

The survey found that roughly 30% of early adopting consumers indicated that online sources were their preferred channel for information on food system issues, followed by friends and family and their local television station. Traditional media sources, including newspapers and radio, were least preferred by early adopters.

Arnot noted that for both surveys, once consumers had a chance to meet a farmer online (as they did on www.farmersfeedus.org) or had an opportunity to read educational text (as they did for the quantitative study), it dramatically improved their perception and attitude toward agriculture.

“These results make it increasingly important for food system organizations to partner with credible groups and connect with consumers using shared values,” Arnot said. “Demonstrating we share an ethical obligation to ensure animals are well cared for is more important than ever before.”



A nonprofit organization

The Center For Food Integrity (CFI) is a nonprofit organization established in 2007 whose mission is “To build consumer trust and confidence in the contemporary U.S. food system by sharing accurate, balanced information, correcting misinformation, modeling best practices and engaging stakeholders to address issues that are important to consumers.”

CFI does not lobby or advocate for individual food companies or brands. Its operating budget is provided through annual membership fees.

For more information about CFI visit www.centerforfoodintegrity.org.