



PUBLIC OPINION REPORT

We Are What We Eat:
Personal Values and Social Responsibility



WE ARE WHAT WE EAT: PERSONAL VALUES AND SOCIAL RESPONSIBILITY

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The 20th century brought along massive changes in our food supply, moving us from an agrarian to urban society. This shift has allowed us to develop the most abundant, safe, affordable and readily available food supply in the world, while also meeting the needs of our busy, complex lives.

Today, most of us find our food in the local supermarket, restaurant or quick service location rather than gathering it directly from our farm fields. However, as we continue to move further away from understanding the sources of our food, there is a growing consumer apprehension about modern food processing and its impact on both our health and the environment around us. Consumers are now questioning both the wholesomeness and nutritional quality of their foods, as well as the people involved in the process of moving their food from farm to fork, such as growers and processors. In many ways we are developing a new relationship with food.

This new interest in food and where it comes from provides the entire food industry with new challenges and opportunities. In order to address these, it is important to understand and explore consumer values and aspirations about food and health as well as their concerns about the food supply and environment. Moreover, we must identify what is driving consumers' decisions about what to purchase and what to eat.

Between May 5th and 12th, 2010, StrategyOne conducted a comprehensive research survey among primary household grocery shoppers in the US. This paper explores a number of the questions posed, and provides an overview of the ways in which consumer shopping behaviors and relationships with food are evolving.

FOOD REFLECTS PERSONAL VALUES

Consumers view food through many lenses. Food is a means of health and a way of forging a personal connection with friends and family.¹ But what is it that truly leads consumers to view foods as more than the basic energy and sustenance necessary for life? It's our personal values, and the way those values are portrayed through the foods we choose to eat.

66% of US grocery shoppers agree that 'the foods I eat make a statement about my personal values.' It's no wonder with this value-based shopping mindset that foods labeled as 'healthy,' 'natural' or 'wholesome' are so popular with the American grocery shopper. One of the key reasons we buy these things is to demonstrate those values to others.

¹ <http://www.strategyone.net/farmtofork.html>

What’s even more interesting than personal value-based food consumption is the lack of significant differences by demographic groups. Across gender, age, income and education, the level of agreement with this statement is stable. The only significant differences identified for this statement are by political party and level of food issue involvement. 72% of Democratic consumers (defined in this study as those who voted for Obama in 2008) agree with this statement, while Republicans (those who voted for McCain) are 62% in agreement. The other group much more likely than others to agree with this statement are those we’ve classified as ‘Food Info-entials,’ or those who read and gather food/nutrition information at least a few times a week, share this information and their opinions with others at least a few times a week, and also advocate a point of view. These informed and influential consumers comprise almost one quarter (23%) of our grocery shopper sample, and 80% of them agree that the foods they eat make a statement about their personal values, versus 62% of all other grocery shoppers that agree with this statement.



	Gender			Age				
How much do you agree or disagree with the following statement: (TOP 2 BOX AGREEMENT SHOWN)	Total	Male	Female	18-24	25-34	35-44	45-54	55-64
The foods I eat make a statement about my personal values	66%	60%	68%	59%	71%	65%	63%	66%

	Income						Education			
How much do you agree or disagree with the following statement: (TOP 2 BOX AGREEMENT SHOWN)	<\$25K	\$25K-\$50K	\$50K-\$75K	\$75K-\$100K	\$100K-\$150K	\$150k+	HS or Less	Some College	College Grad	Grad School+
The foods I eat make a statement about my personal values	66%	66%	65%	72%	63%	65%	69%	62%	67%	65%

	Political Party		Influence	
How much do you agree or disagree with the following statement: (TOP 2 BOX AGREEMENT SHOWN)	Democrats	Republicans	Food Info-entials	Non-Influencers
The foods I eat make a statement about my personal values	72% ↑	62%	80% ↑	62%

SENSE OF COMMUNITY RESPONSIBILITY



The values that are driving purchase behavior aren't just focused on the individual or family, but on a broader sense of community responsibility as well. In line with their values, the majority of US grocery shoppers state that they are purchasing foods that they believe support local businesses, as well as foods that they believe have as little environmental impact as possible. These grocery shoppers aren't just focused on the personal, economic and environmental outcome of their consumption though, they are also concerned with humane treatment of animals, and 61% claim to be willing to pay more for 'free range' or 'cage free' meat and poultry to ensure animals are raised humanely.

Similar to the opinions on personal values, Food Info-entials are more likely than other consumers to agree with each of these three statements, indicating that the more informed and engaged with food issues a consumer becomes, the more likely they are to focus on the broader impact their food purchase decisions have on their community. Democrats are also more likely than Republicans to agree with minimizing the environmental impact of their purchases and the humane treatment of animals, but both parties are equally likely to agree that they purchase foods that support local businesses.

	Political Party			Influence	
How much do you agree or disagree with the following statement: (TOP 2 BOX AGREEMENT SHOWN)	Total	Democrats	Republicans	Food Info-entials	Non-Influencers
I purchase foods that I believe support local businesses	77%	81%	77%	84% ↑	74%
I purchase foods that I believe have as little environmental impact as possible	59%	65% ↑	52%	77% ↑	54%
I'm willing to pay more for 'free range' or 'cage free' meat and poultry to ensure the animals are raised in a humane manner	61%	68% ↑	56%	72% ↑	58%

WILLINGNESS TO CHANGE

With such a large number of American consumers claiming their purchase decisions and the foods they eat already make a statement about their personal values and broader social issues, is there still room for improvement? The answer is yes, and consumers state that they are willing to make further changes in their food consumption habits to help make tomorrow's world a better place to live.

Similar to the previous data, the most willing groups of consumers are the Food Info-entials and Democrats, but individuals with children are also more likely than those without to change their own habits for the long-term benefits than those without.

	Political Party			Influence		Children in HH	
How much do you agree or disagree with the following statement: (TOP 2 BOX AGREEMENT SHOWN)	Total	Democrats	Republicans	Food Info-entials	Non-Influencers	Yes	No
I'm willing to change my own food consumption habits if it can help make tomorrow's world a better place to live	79%	86%↑	73%	89%↑	76%	82%↑	75%

WHO TO TRUST?

However, with this high level of response about individual’s willingness to change for future benefit, their value-based consumption habits and desire for social good, who are the trusted sources of information and what role should the government play in promoting healthy eating habits and physical activity? The answer from consumers is somewhat contradictory.

The groups and organizations that these grocery shoppers trust most to do the right thing when it comes to food related issues are farmers, USDA and FDA. Interestingly, while specific government agencies are highly trusted to drive food issues forward, Congress is rated lowest on trust. In addition, the most informed and influential consumers are less trusting of government agencies (USDA and FDA) than their less-informed consumer peers.

While government agencies are still one of the most trusted groups for doing the right thing, it doesn’t necessarily mean that these consumers want high levels of government involvement in promoting healthy eating habits and physical activity. 40% of these consumers believe that healthy eating habits and physical activity is primarily the responsibility of the individual citizen. Not surprisingly, this data is split by political party, with 51% of Republicans selecting this individual responsibility response, and only 33% of Democrats feeling this way. However, for the majority of consumers, limited government involvement is desired. Only 9% of grocery shoppers feel that the government should go as far as subsidizing healthier choices or roll-out programs that restrict unhealthy choices.



	Political Party			Influence	
How much do you trust each of the following groups or institutions to do the right thing when it comes to food related issues? (0-100 SCALE, MEAN SCORE SHOWN)	Total	Democrats	Republicans	Food Info-entials	Non-Influencers
Farmers	70.0	68.1	72.3	73.0	69.1
USDA	63.3	64.4	61.7	58.3	64.8↑
FDA	61.7	63.7	59.7	57.1	63.2↑
Academic Experts	59.1	63.5↑	56.9	59.2	59.1
EPA	58.9	62.9↑	53.0	59.9	58.6
Congress	32.9	38.9↑	26.7	31.2	33.4

	Political Party			Influence	
What do you think should be the primary role of the government in regards to promoting healthy eating habits and physical activity?	Total	Democrats	Republicans	Food Info-entials	Non-Influencers
Healthy eating habits and physical activity is primarily the responsibility of the individual citizen	40%	33%	51%↑	37%	41%
The government should provide information that helps the individual choose healthier eating habits	30%	33%	29%	28%	31%
The government should develop programs that promote better lifestyles or restrict unhealthy choices for at-risk populations such as children	18%	22%↑	13%	23%	17%
The government should subsidize healthier choices or roll-out programs that restrict unhealthy choices	9%	10%↑	4%	12%	7%



Conclusions

American consumers truly are what they eat; the values we personally hold are portrayed through the foods we purchase and consume. This data implies that it is no longer enough to know how well a new food product fares in a taste test or general market feasibility study, but that a much deeper understanding of consumer-held brand perceptions and values is necessary to position a new product in a way that intersects with their own personal values. As consumers continue to align their food consumption habits with their personal and social values, food companies will need to evolve. The beginning of this evolution is already evident by just walking down the aisles of a grocery store and seeing the number of 'organic,' 'natural,' and 'local' products available today.

However, just labeling a product with these words will not be enough either. It's more important for a brand or product to align with a positive social mission or deeper consumer values to truly break through the clutter on store shelves and achieve its true sales potential.

Methodology

Between May 5th and 12th, 2010, StrategyOne conducted 800 surveys with adult primary household grocery shoppers in the US. The data was collected utilizing a mixed-mode methodology, with 300 interviews conducted online using an opt-in panel of survey respondents, and the remaining 500 interviews being conducted by telephone utilizing random-digit dialing. This methodology was used to ensure the inclusion of all types of adults in the US, those with Internet access, and those with landline telephones.

For a comprehensive presentation of the survey results, please contact Jason McGrath or Tatiana Diaz.

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