

# Trust in food







# **QUANTITATIVE SURVEY**



## What we want to achieve

- ✓ Measure consumer trust in the food actors
- ✓ Quantify levels of consumer trust and monitor them across time and European countries
- ✓ Identify associated barriers and challenges of trust
- ✓ Identify ways to engage consumers in the change process towards more trust
- ✓ Drive awareness of consumer trust issues throughout the European consumer market





## The Consumer Trust Tracker®

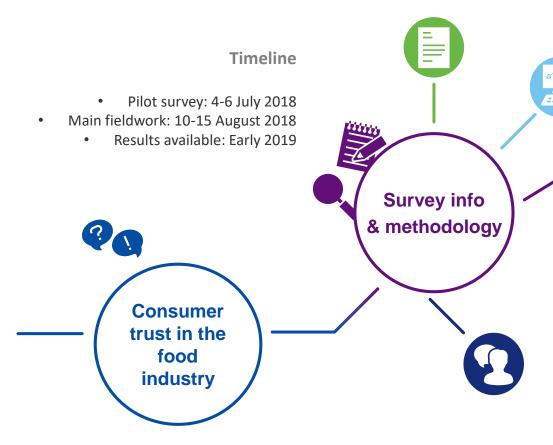
## A voice for the European consumer!

- Standardised survey to measure:
  - Consumer confidence in the food system and trust in its actors
  - Changes in people's perceptions, motivations and intentions towards innovative, healthier and more sustainable food products and food technologies
- Can be extended to specific brands, food products and technologies





## **Socio-demographics**



#### **Technical information**

- Online survey on consumer panels
- Average length of the survey = 12-13 minutes
- Very low dropout rate => 2.9%
- Around 14,750 panelists received an invitation

#### Sample sizes

Country	Sample size*
Germany	1 204
France	1 185
Poland	1 166
Spain	1 171
UK	1 144
TOTAL	5 870

<sup>\*</sup>Data from the pilot (n=500) were included since no changes were made to the questionnaire



Online quantitative survey (Trust Tracker®) and qualitative focus group discussions across 5 European countries

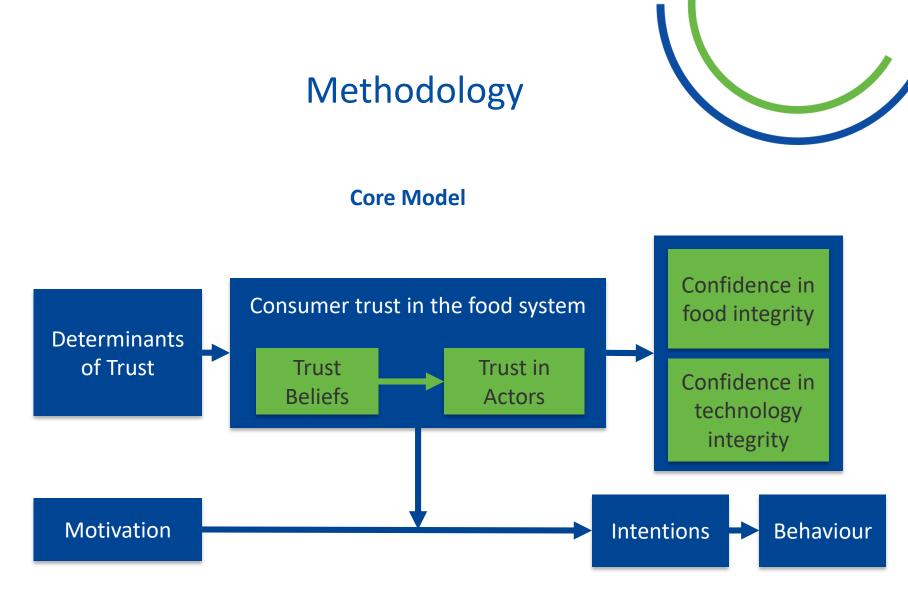
- France
- Germany
- Poland
- Spain
- UK

6,000+ respondents total (Quant: 5,870 Qual: 200)

All fieldwork conducted between July – December 2018

To be extended annually until 2024

In 2019, the project is extended to a further 8 countries



## **Citizen Participation Forum on Trust**

# **QUALITATIVE SURVEY: RESULTS**



## STUDY BACKGROUND

#### AND METHODS

- A sample of 160-200 respondents from five different countries: Spain, France, Germany, the UK, and Poland.
  - 2 different locations covered in each market: urban vs. rural
  - 2 age groups per location: 18-35 vs. 35+
- The focus groups were conducted in local languages using discussion guides and 8-9 conversation cards (results from the quantitative study)

#### COUNTRY/TARGET







## **Questions**

- How do you perceive each actor?
- What are key consumer decision drivers for food?
- What does ...... mean to you?
  - Tasty food;
  - Healthy food;
  - Authentic food;
  - Safe food;
  - Sustainable food
- How does ... impact your behaviour?
- How can ... be improved?





#### TRUST IN INDIVIDUAL ENTITIES WITHIN THE FOOD CHAIN

ARE...

#### BECAUSE...

#### SO MUST...

#### FARMERS



- "poor"
- good
- trustworthy

- are hard-working
- are underpaid
- are under pressure

- ensure transparency
- sell directly
- avoid chemicals
- unite

#### AUTHORITIES



- dependant and weak
- not doing what is expected
- reactive and hidden
- influenced by lobbies & politics
- frequent scandals
- do not educate, explain or adapt standards

- make evidence-based decisions
- be proactive and show results
- communicate reasons for changes and educate

#### RETAILERS



- good at marketing
- poor in sales

the reason for

avoid responsibility

declining quality

not responsible

good at making profit

- say what they want
- do not engage in personal relationships
- aim to increase profit
- only want to make money
- cause harmful & artificial substances usage
- do not care about health, the planet or the law

- be honest & provide details
- prove knowledge & be helpful
- inspire others to follow trends
- focus on quality over quantity
- avoid food additives
- encourage and inspire positive changes

#### MANUFACTURERS



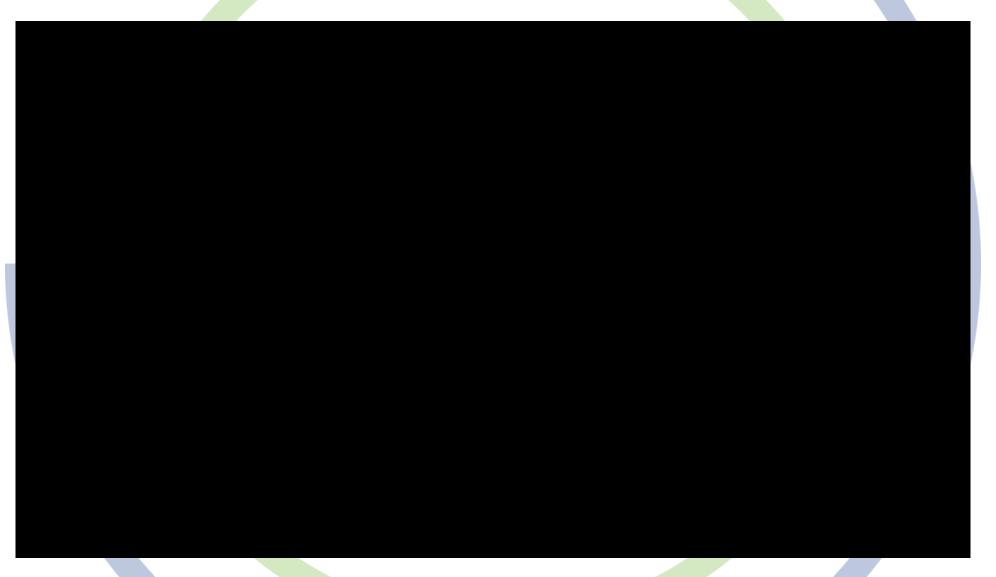


# Key decision drivers

	MEANS	IMPACTS	IMPROVED BY
TASTY	<ul><li>pleasure</li><li>natural</li><li>tradition</li></ul>	<ul><li>(almost) everything!</li><li>perception of quality</li><li>loyalty</li></ul>	<ul> <li>getting back to tradition</li> <li>standards decreasing the quantity of additives</li> <li>promoting natural and fresh food</li> </ul>
HEALTHY	<ul><li>non-harmful in the long run</li><li>well-being</li><li>natural and fresh</li></ul>	<ul> <li>fewer produts that are "only" tasty or proven to be harmful</li> <li>motivation to buy although not liked</li> <li>checking the nutritional value</li> <li>feeling of guilt</li> </ul>	<ul> <li>adapting the labels to make choices easier</li> <li>eliminating harmful additives from the market</li> <li>no deception or tricks</li> </ul>
AUTHENTIC	<ul><li>credible and trusted</li><li>natural and not modified</li></ul>	<ul> <li>choosing what is already tested</li> <li>careful check and looking for details</li> <li>buying less processed food</li> </ul>	<ul><li>supporting "clean labels"</li><li>more legislative pressure on manufacturers</li></ul>
SAFE	<ul><li>not harmful</li><li>natural &amp; fresh</li></ul>	<ul><li>general outlook on the market and buying strategies</li><li>taken for granted</li></ul>	<ul><li>more transparency</li><li>standards aimed at prevention</li><li>tight controls</li></ul>
SUSTAINABLE Food	<ul><li>protecting environment</li><li>durability and thinking about the future</li></ul>	<ul><li>not making individual food choices</li><li>eco-friendly habits</li><li>buying fresh and local</li></ul>	<ul><li>education and explanation</li><li>availability</li><li>changes in the production &amp; retail</li></ul>

stage

# Why we unfold food?



## FoodUnfolded® Objectives

- A consumer collaboration platform
- A two-way community: dialogue between academia, sector and consumers is at the core
- A place to interact and learn about food in the context of new technologies
- A place for start-ups and sector to gain feedback, co-create and explore innovation driver

Go to www.foodunfolded.com for more information!

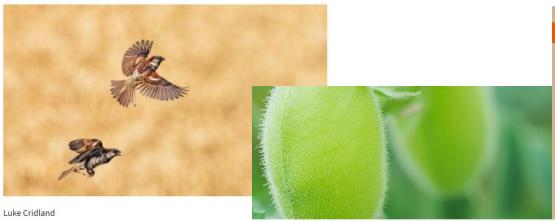








# Reconnecting people with how our food is produced







Jane Alice Liu

#### WHAT WOULD YOU DO WITHOUT THESE 8 FOODS

There's a bit of controversy around 'convenience foods' in its effects on the environment and your health.

#### HOW TO SAVE YOUR FOOD FROM PESH

As cute as birds are, they can waste money, time, and importantly, food.



Meghan Horvath

VERTICAL FARMING | WHAT'S THE DEAL ANYWAY?

Do you know how vertical farms work?

### CHICKPEAS | HOW IT'S GROWN







Meghan Horvath

#### CHEESE-TO PASTEURISE OR NOT TO PASTEURISE?

The process of pasteurisation has helped preserve food and made it safe to eat for longer.

www.foodunfolded.com





# Thank You

