



# SEGMENTTrak

**What "Indicator Consumers" Want to Know Most  
About How U.S. Foods Are Produced**

**Executive Summary – April 2010**

*A Service of*  
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## INTRODUCTION

Factors filtered daily by consumers help them establish an ongoing and ever-changing stream of attitudes and opinions about their food supply. From news reports on the economy to the latest product recalls and health studies, the flow of influences is constant, generating attitudes that are a living target. *SegmenTrak™*, a new, nationwide study, seeks to provide an ongoing stream of up-to-date consumer data with which to navigate the marketing climate.

Opinion-formation is not the same in all consumers. Some adopt early and lead; others follow. Those who choose to be exposed to information earlier are first to form educated opinions, and to set a path for others. Demeter Communications' trademark screening system, at work in *SegmenTrak™*, taps consumers at the front of the learning curve, revealing views and data that foreshadow tomorrow's mainstream consumer. *SegmenTrak's* February 2010 study addressed the following objectives:

- Gauge "indicator consumer" perceptions of different types of farmers, as well as perceptions of their food production motives.
- Identify consumers' current and preferred sources of information regarding how their food is produced.
- Measure consumer reaction to various terms that describe farmers and food production methods.
- Identify what consumers would most like to learn from farmers about food production.
- Determine what consumers would most like to change about the way their food is produced.

## METHOD

This study reports the findings of an online study conducted in February 2010 that included 444 respondents between the ages of 23 and 55, drawn from the continental U.S. The male and female respondents represent a diverse cross-section of ethnic backgrounds, income levels and rural versus urban settings. However, per *SegmenTrak™*'s indicator consumer screening, all are the primary household decision-maker for consumer product purchases, with a minimum of one child living at home. All visit a grocery store at least weekly, and fit within a select, accepted level of awareness of consumer issues. The study was designed and analyzed through Demeter Communications' *SegmenTrak™*, with data collection by Survey Sampling International. The margin of error for the study is +/- 5 percent at the 95 percent confidence level.

## SAMPLE

Respondents were primarily female (82 percent), with at least one child living at home. Individuals aged from 45 to 55 years made up the majority of respondents (60 percent), followed by consumers aged 35 to 44 years (20 percent).

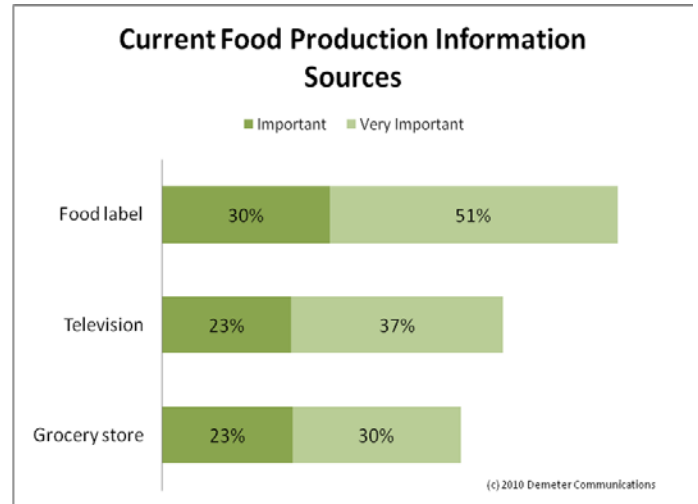
Among indicator consumers, about 53 percent reported a household income of less than \$55,000, while 32 percent reported earnings from \$55,000 up to \$104,999.

Indicator consumers represent a diverse cross-section of life settings. About 57 percent of respondents live in either large cities, metro areas, or smaller cities, while about 43 percent hail from locations with a lower population concentration.

## KEY FINDINGS

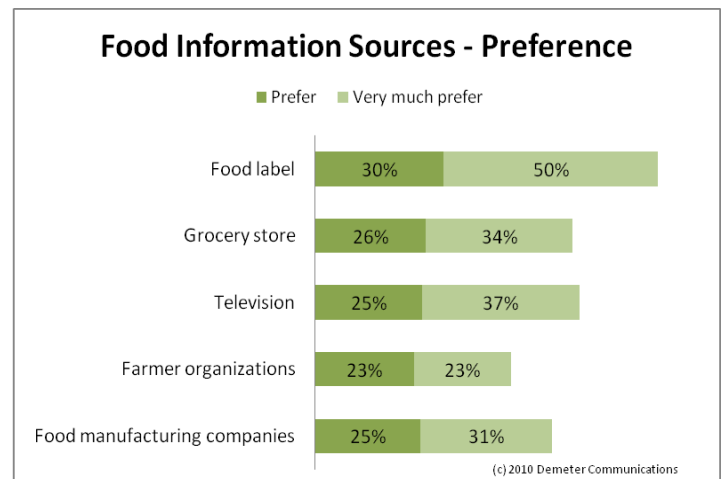
### *Consumers Look to Food Labels for Food Production Information*

Indicator consumers, as identified through *SegmenTrak™* screening, rely most on food labels for “information regarding how food is produced...” Eighty-one percent of consumers called labels “important” or “very important” as a source of information regarding how a particular food is produced. Television fell into second place (60 percent “important/very important”), followed by information found in the grocery store (53 percent “important/very important”). Also evaluated for use were sources including social media, individual farmers, farm organizations, food manufacturing companies and government agencies, among others.

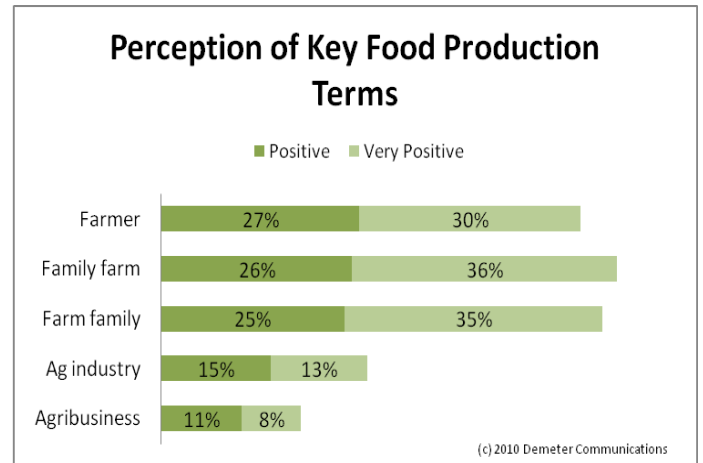


### *Preferred Source of Food Production Information*

If indicator consumer preferences were met, they would continue to rely the most on food labels for information on U.S. food production methods. However, food manufacturers would be relied upon more than currently (up 11 percent for “prefer/very much prefer”), as would farmer organizations (up 9 percent for “prefer/very much prefer”).

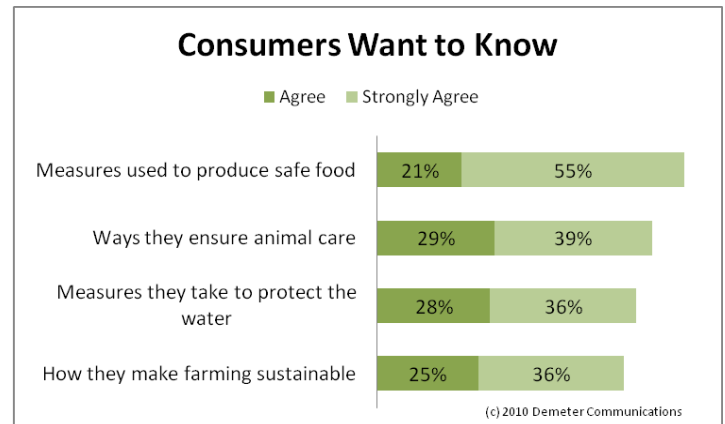


**Perception of Key Food Production Terms**  
 SegmenTrak™’s February 2010 wave tested terms commonly used in current public discourse about food production and agriculture. Consumers feel more positively toward “farmers” (57 percent “positive/very positive”) and “family farms” (62 percent positive/very positive) than they do toward “ag industry” (28 percent) or “agribusiness” (19 percent). Additional terms were evaluated, from “local” and “sustainability” to “conventional farming,” “crop protection products,” “farm animal humane care activist” and others.



**Consumers Want to Know About Safe Food Measures, Ensuring Animal Care**

In an aided question, consumers considered what they would “like to know from farmers about food production that you currently do not know?” The largest segment of indicator consumers agreed they would like to know more about “measures used to produce safe food” (76 percent “agree/strongly agree”), and “ways they ensure animal care” (68 percent “agree/strongly agree”). Respondents agreed they would like to know “measures they take to protect the water” (64 percent) and “how they make farming sustainable” (61 percent).



**Consumers Would Ask Farmers**

In unaided format, indicator consumers said “the single most important piece of information you would like to have from farmers about how your food is produced.” The largest segment (22 percent) of questions pertained to chemicals and/or pesticides used during production and/or potentially remaining in consumer end products. A distant second (10 percent), consumers would ask farmers about medications and/or antibiotics used in production and/or potentially remaining in consumer end products.

*“How much and in what form do the chemical herbicide and pesticide have residual life in produce?”*

*“I want to know exactly what chemicals, antibiotics and fertilizers are used, for how long, why, and what the effects are on humans.”*

## CONCLUSIONS

- Indicator consumers are looking to food labels for more and different types of information, seeking even more facts about product content and the production environment of products. These demands are likely to shape the content and presentation of information electively placed on labels to achieve marketing goals.
- These consumers will consider information on food production provided by food manufacturers and farmer organizations, having identified them as preferred sources. This opens the door for expanded roles for those attuned to consumer concerns.
- Effective educational and marketing materials will reflect language choices based on consumers' positive view of "farmers" and "family farms," as opposed to their less accepting view of "agribusiness" and "ag industry."
- Additional conclusions are available in the full *SegmenTrak*<sup>TM</sup> report.

## LEARN MORE

This executive summary provides just a snapshot of data discovered through the inaugural fielding of *SegmenTrak*<sup>TM</sup>. A full report is available for an additional fee. Additional data explored in the full report includes:

- Indicator consumer ratings of potential sources of information for children who are learning about how their food is produced.
- Perception ratings for additional terms related to agriculture and the production of foodstuffs.
- Initial indicator data on the value consumers place on human safety versus that placed on the welfare of animals.
- Ratings of indicator consumer perception of grain farmers, livestock farmers and initial feedback on their perceived motives in food production.
- What indicator consumers would most like to change about how their food is produced.

To purchase the full report, explore options for custom analysis, or to inquire about buy-in opportunities for the next wave of *SegmenTrak*<sup>TM</sup>, go to [www.demetercommunications.com](http://www.demetercommunications.com). Or, contact Claudine Wargel, Demeter Communications senior partner, at 217.935.6421, [claudinewargel@demetercommunications.com](mailto:claudinewargel@demetercommunications.com).