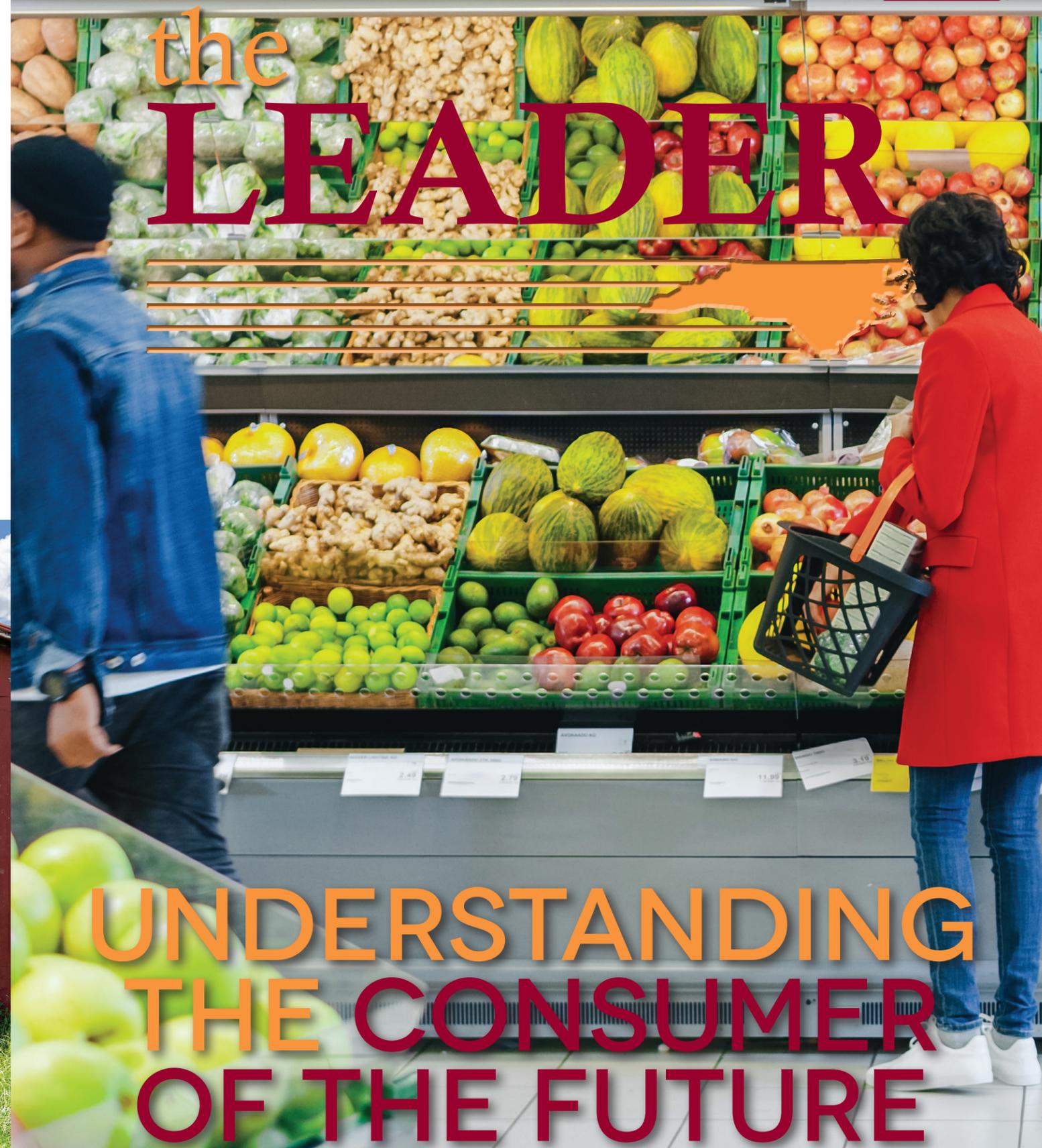




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## UNDERSTANDING THE CONSUMER OF THE FUTURE

It takes courage and foresight to look a challenge in the eye and recognize that progress can only come with a departure from familiar, expected approaches to a path forward that breaks new ground to find a better way. It's going to take an ongoing commitment to understanding these dynamics, a willingness to keep asking hard questions with hard answers, and an openness to changing how we do things in some cases. We also must acknowledge that the relationship between ag and non-ag, urban and rural, is not a zero-sum game – a win on one side does not mean a loss on the other.

## UNDERSTANDING THE CONSUMER OF THE FUTURE



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Back in November, North Carolina Farm Bureau hosted a two-day Communications Summit as part of our Shared Values Initiative. Attended by a broad coalition of agriculture and business leaders, the Summit was an opportunity to share thought-provoking research findings, stimulate honest dialogue among attendees, and encourage creative solution building. Additionally, as important context for participants, the Summit looked at how farming is evolving and how agriculture will transition to meet consumer expectations in the next 20 to 30 years.

You may recall that we shared some of our polling and focus group findings in our November edition of The Leader (which you can find online at [www.ncfb.org/news/the-leader](http://www.ncfb.org/news/the-leader)) but to recap, here were some key takeaways:

- Knowledge of agriculture and rural issues is low, and few participants could identify a credible source of information on ag and rural issues
- Trust in farmers is high, and participants who know a farmer or have a connection to a farm are much more likely to have a positive opinion of agriculture
- Participants expressed far less trust in the food system and supply chain than in farmers themselves
- Price, safety, and availability of food remain the most basic and important factors for consumers
- Participants trust small, family-owned farms and believe they are more environmentally conscious, ethical, and humane; they distrust large and/or corporate operations because they believe they are more likely to cut corners or be driven primarily by profit. However, they struggle to define the qualities that make a farm “big” or “small.”
- There is a general understanding that rural areas are under-invested, but participants were hesitant to divert funding away from urban and suburban areas

In addition to polling and our focus group findings, the Center for Food Integrity shared additional research on trends in consumer values and preferences with the group at the Communications Summit. These macro-level research findings painted a very different profile of today’s consumer as one who increasingly cares about things like animal welfare, environmental responsibility, and social justice when thinking about agriculture, despite evidence to suggest that price, safety, and availability are still far and away consumers’ main priorities in making food purchasing decisions.



So how can we make sense of these two competing ideas about the consumer of today and of the future? First, we must always keep in mind that consumers are changing rapidly and becoming more diverse – age, generational expectations, ethnicity, geographic origins and more. In fact, millennials are now the largest segment of the population; by 2050, no single ethnic group will represent a majority.

Consumer views on food are changing as well. A growing trend among consumers is the idea that food is medicine and that “safe” means more than just free of pathogens. Furthermore, consumer expectations are changing – today’s consumers expect safe, healthy, and affordable food to be readily available AND they demand additional attributes like environmental responsibility, social justice, and transparency from growers. This “And not Or” mentality is the key to understanding the seemingly contradictory signals in our research.

One of the biggest takeaways from our **focus groups was that participants expressed values and priorities surrounding food and agriculture that demonstrate how complex, personal, and nuanced these positions are.** It was not uncommon for participants who express the most interest in agriculture and support for farmers to also share misinformation or express negative opinions. Likewise, those who seemed antagonistic initially often took positions in support of farmers and agriculture. This highlights the importance of digging deeper and forming meaningful, intentional relationships rather than making assumptions about who is our “friend” and who is our “enemy.”

Our focus group conversations also showed how hard it is for many people to articulate their values and beliefs about agriculture. The fact is they don’t think about it very much – their knowledge and opinions are a patchwork of news articles, social media posts, and a few first-hand experiences or stories from friends. But we have to move past that being a criticism and instead accept it as reality.

So how can we prepare for a future where consumer expectations are constantly changing? And how do we engage with people who don’t seem to know exactly what they want from us? The answer is that right now we are far from having all of the answers, but there are a few things we can do.

- 1 Increase Engagement:** When it comes to strategic planning, both long and short term, the ag community needs to prioritize engagement while using PR and communications campaigns as a supporting role. Consumers don’t want to be talked at; they want meaningful interactions, whether digital, virtual or in person. Authentic engagement builds the trust needed for them to open their hearts and minds to new concepts.
- 2 Commit to Increasing Transparency:** Transparency can be an intimidating concept for individuals and businesses alike. Historically, the risks of transparency seemed to outweigh any benefits. But research has shown that transparency is the single most effective strategy in overcoming the bias against today’s agriculture and building trust. Engaging with consumers in a proactive, transparent way will pave the way to building the trust North Carolina agriculture needs.
- 3 Build Capabilities, Capacity and Networks:** During the workshop sessions, each group identified engagement training as a critical tactic to achieve objectives. To engage more with consumers and create opportunities for transparent dialogue, a network of trained and willing farmers, ag professionals, and food industry experts across the state of North Carolina will be needed.