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# Deliverable Report

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# CONTENTS

# 1. Executive Summary

As part of the Grand Challenge on Consumer Trust project, partners in the UK, Finland, Poland, Spain, Italy, and Israel have each held 1-2 workshops and 3-4 interviews with actors across the food supply chain to understand their concerns and perspectives in relation to consumer trust. These workshops and interviews provided insight about the issues that increase or decrease consumer trust in the food supply chain, major consumer trust-related issues in the supply chain, and current and future/potential initiatives aimed at increasing consumer trust. Through a high-level and country-level gap analysis, the findings of industry perspectives were then compared and contrasted with the insight gathered from consumers in the focus groups and the Delphi survey. This has shed light on similarities and differences of consumers' and industry experts' views on consumer trust in various supply chain actors (i.e. farmers, food manufacturers, retailers, governmental bodies, and restaurants and catering services). Additionally, the gap analysis allowed us to compare the trust-related initiatives highlighted by food industry experts and consumers. Investigating the gaps between what the industry considered to be high-priority initiatives and what consumers demanded from the supply chain resulted in identification of those initiatives that were of high priority for both consumer groups and food industry.

# 2. Food industry perspective

The aim of this task was to understand the food industry actors' perspectives and concerns in relation to consumer trust as well as identifying the gaps between consumers' and food industry perspectives and concerns in relation to trust. For this purpose, as a part of this task, the participating countries (i.e. Finland, Poland, Spain, Italy, Israel and the UK) conducted 4 to 8 interviews with actors from the food supply chain (including food authorities, members of the media, and food companies). In addition to this, participating countries conducted a number of workshops with food industry actors to understand their perspective of consumer trust in the food supply chain and to identify the existing gaps between consumer and industry perspective. Based on this comparison, gap analyses (at the high-level and at the country-level) have been conducted.

In the following section, first, a brief overview of those stakeholders invited for workshops and interviews will be provided. This will be followed by a brief overview of industry workshops and interviews. Finally, the gap analysis (both at the high-level and at the country-level) will be discussed.

## Summary of key stakeholders

For industry workshops and interviews, actors from across the supply chain were contacted. The details of the stakeholders approached in each country will be discussed in the following sections.

### Workshop participants

In the UK, a total of 9 participants shared their views and experiences in two workshops, 5 of them being employees of companies involved in the food supply chain (food processors and manufacturers), 3 of them being consultants (industry advisors) and 1 of them being a food journalist and a policy advisor for a wholesale/retail market (media/policy making). Participants had senior roles ranging from CCO to R&D Director, Director of Strategy and VP of Communications at multinational food and beverage organisations working in the industry.

In Finland, 7 industry participants took part in the workshop. Workshop participants involved a large Finnish food manufacturer, another Finnish food manufacturer, specialized in producing high-quality food products from Finnish meat, a large Finnish retail group, an association representing Finnish bread industry, an industry federation widely representing the interests of the Finnish food and drink industry, an association that promotes the interests of grocery trade and foodservice wholesales, an association that promotes Finnish food and food culture by providing information about food and the food production chain, and administering a certificate for Finnish food products.

In Israel, two workshops were held, one with 6 participants and the other with 4 participants. Participants were senior managers of food companies, four women and two men. Participants had senior roles including Vice President of Regulation and Corporate Responsibility at a global manufacturing company, Consumer Service Manager of a manufacturing company, CEO of an import company, CEO of a sector at a manufacturing company, Brand Manager in a manufacturing company, the Director of Health in a manufacturing company.

In **Spain**, the 8 workshop participants mainly came from companies and organisations involved in the food chain – primary producers, retailers, processors, food service, large companies involved in all stages as well as from governmental bodies (i.e.industry bodies, Government, regulatory and advisory body, Food processors and manufacturers, Consumers Groups).

In **Italy**, participants were selected from the food industry as well as the academic sector.

In **Poland**, two workshops, one with 8 participants and the other with 6 participants, were held. In the first workshop, the President/Chairman of the Board of a bio/organic food producer - fruit growing and processing, the junior Food Safety Manager (Quality Department) of a food services and facilities management company, the president/Chairman of the Board of a certification company, the director of development of new products for the Polish market, the president/Chairman of the Board of another certification company, the CEO of a trading, distribution and production company in the dairy industry, the Company employee – Manager of a strategic consulting organisation, a marketing department employee from a dairy producing company took part. In the second workshop, the Key Account Manager of an audit /certification company, a company employee/Manager from an organisation operating for sustainable development and environmental protection, responsible consumption and production as well as respect for human rights and environmental protection principles in business, an employee from the producers' association, the PR account executive of a confectionery company, a marketing department employee of a dairy producer, and a Marketing Manager from a dairy producing company took part.

### Interviewees

A total of 25 interviews were conducted with actors from the supply chain. In **Finland**, the University of Helsinki conducted 1 interview with a representative from a food industry organisation, 1 interview with a journalist, and 1 interview with a representative of a government administration. In **Israel**, Technion conducted 1 interview with a representative of a food manufacturing company, 1 media person, and 1 representative of a regulatory association. In **Italy**, the University of Turin conducted 2 interviews with employees of a food confederation, 1 interview with a representative of a food federation, 1 journalist from a Journalism Festival, and 1 representative of a consulting NGO to the (***). In **Poland**, the University of Warsaw conducted 1 interview with a representative of a food federation, 1 interview with an entrepreneur/mentor, 1 interview with a journalist, and 1 interview with an employee of a government ministry. In **Spain**, the Autonomous University of Madrid conducted 1 interview with a representative of (***) industry organisation, 1 interview with a food magazine, and 1 interview with an employee of a government agency. In the **UK**, the University of Reading conducted 1 interview with 2 employees of a food manufacturing company, 1 interview with a journalist from a food magazine, 3 interviews with employees of a government department, and 1 interview with a representative of a semi-governmental body. Additionally, the Queens University Belfast conducted 1 interview with a representative of a food-related union.

## Industry workshops

### The aim of the industry workshops

The aim of these workshops was to explore industry experts' views and understanding of the issues surrounding consumers' trust in food and the food supply chain.

### Method

A total of nine online industry workshops were conducted in Finland, Israel, Italy, Poland, Spain and the UK with a total of 56 industry experts. More specifically, one 2-hour workshop with 7 industry participants was conducted in Finland, two industry workshops with a total number of 10 participants were conducted in Israel, one industry workshop with 8 participants was conducted in Italy, two workshops with 14 industry participants were conducted in Poland, one industry workshop with 8 participates was conducted in Spain and two workshops with 9 participants in total were conducted in the UK.

### Key findings

Experts shared their views in relation to issues that increase and decrease consumer trust. In this regard, transparency, social contribution and sustainability, consistency across the supply chain, clear value propositions and having shared values and emotions with consumers, communication and information sharing, product quality, safety and authenticity educating consumers and raising their level of awareness were highlighted as issues that increase consumer trust. Further to this, lack of transparency, misleading marketing practices, consumers' negative experience with food companies, negative media coverage/politics, misinformation or too much information, lack of direct contact and communication with consumers were mentioned as issues that decrease consumer trust.

## Industry interviews

### The aim of the industry interviews

The aim of industry interviews was to explore the views of several key stakeholders along the food value chain regarding the role of consumer trust, trust engendering activities they have already undertaken and those they plan to undertake in the future.

### Method

For this task, project partners from the University of Reading, Queens University Belfast, University of Turin, University of Helsinki, Autonomous University of Madrid, University of Warsaw, and Technion conducted three to five interviews each in Finland, Israel, Italy, Poland, Spain, and UK. In total, 25 interviews were held by partners. Answers of all interviewees were collated into one Excel document in order to write summaries of the main findings per question, for each stakeholder group of each country.

### Key findings

How the food system is perceived by its citizens and the various stakeholders involved along the food value chain differs largely by country. Italian consumers seem to have a unique relationship with food and place a lot of importance on local or at least national products that have been produced traditionally and hence suggest a certain level of quality. Poland prides itself on being a big exporter of food and therefore concluding that, especially abroad, the Polish food system has a good reputation. The UK is heavily influenced by their recent exit from the EU which creates an uncertain future when it comes to provenance and standards of imported food. Finland believes to have very good collaboration among stakeholders along the food value chain and their national authority is well trusted by consumers for fact-based information, even though social media does pose a new challenge through fake news. Israel is proud of a strong and independent food industry that survived COVID-19 without outside help. Spain also has the impression that the pandemic actually had a positive impact on the food sector but that this will soon be forgotten, and media will take over the discourse again.

One of the main barriers to engendering more consumer trust appears to be the financial aspect. Tackling such an all-encompassing issue in such a complex industry requires cooperation and various activities that require investment. Another barrier that was mentioned is the (lack of) collaboration with and within public administrations that would be necessary to guide consumers and the industry from a united front.

Recommendations for how to improve consumer trust include more transparency from the industry and a more honest discourse about what still requires improvement. Emphasis is also placed on the need for more information provided to the consumer, combined with education that may start as early as primary school. Lastly, a common theme across stakeholder interviewees is the need to cooperate, within and between different stakeholder groups, due to the global nature of the food system and the multifactorial influences on consumer trust.

Many of the interviewees believe that COVID-19 will not have major long-term effects on consumer trust in food and predict things will eventually get 'back to normal'. However, it is acknowledged that this pandemic may have made consumers more aware of the importance of the food supply chain and how fragile it is. They may in the future lean more towards local products just as countries may lean towards attempting to be more self-sufficient to brace for the future.

Across stakeholder groups, there is a common wish to focus more on science-based information and for consumers to learn how to steer away from fake news. Although consumer trust is of increasing importance to all stakeholders, how to engender it and how keep it appears to be a struggle, due to its multi-factorial nature which makes trust difficult to influence, requiring substantial financial input and last but not least the willingness of all actors to achieve it.

# Gap analysis

## The aim of the gap analysis

In the first year of this EIT Food Grand Challenge project (2020), partner countries (Finland, Israel, Italy, Poland, Spain and the UK) have conducted a number of focus groups and a Delphi survey with consumers; as well as workshops and interviews with industry experts to gather insights on consumer trust in the food supply chain. The aim of the gap analysis was to bring together the insights collected through the abovementioned methods across the six countries, with the aim of highlighting the gaps between consumers' and industry's views on issues related to trust. This gap analysis enabled us to identify future initiatives and industry actions that can improve consumer trust in the food supply chain and its actors.

## Summary of the high-level gap analysis findings

Key insights from the cross-country gap analysis suggest following areas of convergence between stakeholders (primarily consumer and industry perspectives):

- Increasing transparency (at all levels e.g. from marketing, manufacturing, farming and consumer use) is associated with increased levels of consumer trust.

- Traceability across the supply chain is seen an important initiative in building trust with consumers.

- Sustainability initiatives are seen to improve consumer trust.

- Farmers are seen as the most trusted actors of the food supply chain

One key suggested focus in the gap analysis is on communication (including campaigns and labelling) that can encourage all stakeholders to engage in more transparent actions. We also note areas of divergence from the gap analysis that future trust building activities should consider. These include: Levels of trust in authorities, the importance of locality to trust and importantly the concept of communication itself. In developing communications to improve trust, it is important to consider: Should communication be two-way or one-way? Are consumers really interested in communicating with food chain actors? Will food chain actors really listen to consumers?

This section summarised the findings of the activities undertaken in the Food Industry Perspective task. The full reports of industry workshops, industry interviews, and gap analysis can be accessed in the annexes of this report.

# 3. Annexes

## Industry workshops summary

This activity has received funding from EIT Food, the innovation community on Food of the European Institute of Innovation and Technology (EIT), a body of the EU, under the Horizon 2020, the EU Framework Programme for Research and Innovation

# Deliverable Report

| Deliverable | |
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| Title: | Industry workshops summary report |
| Type of Deliverable | R: Document, report |
| Authors: | Niloofar Borghei Razavi<br>Irene Garnelo-Gomez<br>Kevin Money |

# Executive summary

Nine workshops with a total of 56 industry experts were conducted across six countries (Finland, Israel, Italy, Poland, Spain and the UK) between June and September 2020. The aim of these workshops was to explore industry experts' views and understanding of the issues surrounding consumers' trust in food and the food supply chain. Experts shared their views in relation to issues that increase and decrease trust, highlighting the role of 'transparency' in both increasing and decreasing levels of trust (when there is a lack of it). Based on their experience, experts also shared their opinions regarding current initiatives aimed at increasing trust. All data collected is of high value, not just on its own, but when compared to the data collected from consumers in relation to similar topics. Thus, gaps between industry experts' and consumers' views are also considered in this report.

After a brief introduction, in which sample characteristics in relation to the nine workshops are summarised (Section 2), the industry views of issues that increase consumer trust in each country are compared and contrasted (Section 3). In Section 4, the industry views of the issues that decrease consumer trust are presented, while in Section 5, those organisations that are more trusted by consumers are identified. In Section 6, current initiatives that aim to increase consumer trust are discussed, followed by a discussion on the gap between consumer and industry perspectives in relation to trust in food (Section 7). The final section (Section 8) elaborates upon opportunities for future initiatives that could improve consumer trust in each country.

# Introduction

This report summarises and brings together the findings of the 9 industry workshops conducted in Finland, Israel, Italy, Poland, Spain and the UK with a total of 56 industry experts. More specifically, one 2-hour workshop with 7 industry participants was conducted in Finland, two industry workshops with a total number of 10 participants were conducted in Israel, one industry workshop with 8 participants was conducted in Italy, two workshops with 14 industry participants were conducted in Poland, one industry workshop with 8 participates was conducted in Spain and two workshops with 9 participants in total were conducted in the UK. Workshop participants in all countries were employees or representatives of various organisations from the food supply chain (i.e. food processors and manufacturers, industry advisors, media, policy making and regulatory bodies, and industry representatives) and all participants held senior roles in their respective organisations.

# Industry views on issues that currently increase consumer trust

## Transparency

Transparency is a topic that has been discussed in reports from all countries (Finland, Israel, Italy, Poland, Spain, UK). In this regard, the UK report highlights the importance of openness and honesty and willingness to engage in difficult conversations about transparency and links transparency to accountability and responsibility. The connection between transparency and responsibility is also touched upon in Italy's report.  Italy's report considers "simple, verifiable communication about food production, distribution and quality" as the key to transparency and transparent communication. Spain's report associates transparency with information-sharing in the most comprehensible way so that the processes are not open to interpretation. Similar to this, Israel's report also links transparency to communication and argues that companies should be transparent in their actions and then communicate their transparent actions to consumers. Poland's report takes this one step further by suggesting that the expectation for transparency is increasing in the industry and those who do not acknowledge and respond to this expectation will have a challenging time gaining consumer trust. Transparency has also been linked to ethics and ethical behaviours of the supply chain as well as the supply chain's honesty both in terms of sharing credible messages as well as authenticity and quality of products and ingredients.

Further to this, Finland's report also identifies transparency as an important issue in increasing consumer trust and demonstrates that the Finnish food system is highly transparent.

## Social contribution and sustainability

Sustainability practices of food organisations as well as their social contributions are highlighted as important contributors of consumer trust. In this regard, Poland's and Spain's reports showcase that consumers are becoming more aware and more demanding about the environmental implication of food industry activities. In most reports, this has been discussed in relation to animal welfare, corporate social responsibility, as well as responsible, sustainable and ethical production. Italy's report highlights the importance of building an ethical public image for an organisation. Israel's report also reflects on sustainability matters and adds that food organisations should give back to the local community, for example by hiring local people. UK's report also reflects on the importance of giving back to the community to build trust, however, this report also demonstrates that the level of awareness of consumers in various markets, and therefore their demands and expectations from the supply chain varies in each market. Finland's report shows that climate change urgency has an impact on consumer's perception of food producers.

## Consistency across the supply chain

Country reports from Spain, UK, and Israel argue that consistency across the supply chain as well as consistency over time can contribute to an increase in consumer trust in the food supply chain. In this regard, the UK report demonstrates that consistency across company and across the supply chain plays an important role in shaping consumer trust as when everyone is saying the same thing and acting consistently, it is easier to get a message across. Spain's report emphasises on the importance of consistency over time and Israel's report highlights the cruciality of keeping promises, especially in regard to keeping prices stable, avoiding a price increase in times of crisis (e.g. the COVID-19 pandemic), and consistency of quality over time. Finland's report discusses this in the context of the self-monitoring of quality by Finnish suppliers to assure consistently high quality in their production.

## Clear value proposition – shared values and emotions

The role of value in trust building has been considered from two perspectives. Israel's and Spain's report argue that to build trust, organisations should have clear value propositions. The UK report demonstrates that in addition to a clear value proposition, it is important for organisations to have shared values with their stakeholders. In this regard, a number of participants in the UK workshops stated that having shared values with consumers will lead to higher levels of identification, which in turn can drive trust for the organisations. Italy's report touch upon the emotional value of food and food products and demonstrates that enhancing the emotional value of food increases consumer trust as food is a fundamental aspect of a culture.

## Communication and information sharing

Communication, information sharing, and the role of media were highlighted in country reports. In this regard, Italy's report suggests that industry's communication with consumers should be simple and direct. Israel's report argues that those organisations who have better communication with consumers, enjoy higher levels of trust. Further to this, Spain's report highlights the role that social media plays in shaping consumers' attitude and argues that positive media and social media coverage of industry activities can have a positive impact on trust. It is noteworthy that communication and information sharing go beyond direct firm-consumer communications, and also cover the information shared on labels about ingredients and production/consumption process.

## Product quality, safety and authenticity

As mentioned in the previous section, in addition to transparency and communication about processes, the quality, safety, and authenticity of ingredients and products are also of high importance. Poland's report demonstrates that quality of products and ingredients is of high value to consumers and has a direct impact on the reputation of organisations. UK's report showcases that the meaning of quality can differ from one market to another and it is important for organisations to take the characteristics of the target market into account. Israel's, Spain's, and Finland's reports discuss the importance of consistency in the context of quality and highlight that having a consistently high quality has a positive impact on how consumers build trust with food suppliers and the food supply chain.

## Educating consumers and raising their level of awareness

Country reports highlighted the challenge of changing consumer attitude and behaviour as well as the importance of consumer education in relation to food products and production processes. Italy's report emphasises a more comprehensive and widespread education on food and nutrition for consumers as this will help them filter information received through various media channels. UK's report argues that those consumers with more knowledge about the food industry could perhaps understand the sector and its complexities better and therefore, levels of trust could be higher. Poland's report highlights that increased consumer awareness and knowledge has a positive impact on their trust in food organisations.

### Action orientation and crisis management

Country reports demonstrate that organisations' approach to scandals and crisis can influence their perceived trustworthiness. Israel's report argues that organisations should take a proactive approach and take initiative, especially in times of difficulty (retailers' response to COVID-19 is one example). UK's report reveals that most issues have short-term impact. However, certain scandals and issues tend to have a longer-term impact and stay in consumers' memory for a long time. Therefore, it is crucial for organisations to identify which issues are going to have a long-term impact and therefore, need to be addressed in a more serious manner. Finland's report also highlights that food organisations' approach to crisis and crisis-handling and their willingness to solve problems together with other stakeholders (e.g. consumers) affects the level of consumer trust.

# Industry views on issues that currently decrease consumer trust

In addition to issues that can increase consumer trust in the food supply chain, country reports elaborate upon issues that can decrease consumer trust, based on the opinions shared by experts. According to country reports, a decrease in trust often occurs in the absence of the abovementioned factors.

### Lack of transparency

In country reports, transparency is highlighted as one of the major issues that can either build or diminish consumer trust. UK's report argues that transparency is not only important in the context of scandals when they arise, but rather, in terms of the proactive approach of organisations in being upfront and honest with consumers. If organisations fail to be as transparent as they could, levels of trust could decrease. This latter has also been discussed in Italy's, Finland's, and Israel's reports.

### Misleading marketing practices

Country reports demonstrate that dishonest and manipulative marketing and advertising practices of food organisations can have a negative impact on consumer perception and consumer trust. In this regard, Poland's and Spain's reports highlight that consumers are already overwhelmed by ads that are aimed at manipulating consumers rather than providing useful information and guidance to consumers. Further to this, Israel's report argues that trust can be damaged when sustainability and CSR activities are used as marketing tools. In line with this, Finland's report highlights industry experts' scepticism about food-related information disseminated by large organisations as they associate these with 'marketing propaganda'.

## Consumers' prior (negative) experience with food companies

Country reports demonstrate that consumers' experience with products and/or services of food supply chain actors can affect their level of trust. Poland's and Finland's reports demonstrate that consumers do not trust those organisations that they have had a disappointing experience with. Additionally, Spain's, Israel's and UK's reports highlight that consumers' dissatisfaction with the offering of organisations, both in terms of quality and consistency (at the organisation-level as well as at the chain-level), can damage their trust and result in avoiding that specific organisation for an extended period of time.

## Negative media coverage – politics

The role of media (e.g. newspapers, television, radio) and social media has been highlighted in country reports. Israel's report pinpoints that the media is interested in presenting stories that produce "headlines", which are usually negative stories like class-action lawsuits. Additionally, they noted that politicians are also interested in creating a "buzz", to be perceived as heroes rescuing the public from food companies, whereas in reality, their actions can wreak havoc consumer trust in the supply chain. Further to this, Spain's report highlights that negative feedback or comments shared by influencers and consumers on social media platform such as Instagram, Twitter or Facebook can be damaging to trust as sometimes these opinions or comments are shared by people with no specific expertise. In line with this, Finland's report illustrates that media coverage that emphasises scandals and bad news related to food industry overshadows what is working sell in the day-to-day life of the food supply chain. This report also argues that negative media coverage makes food producers look bad in regard to the urgency of climate change as media gives consumers this impression that food industry is not doing enough.

## Misinformation or too much information

Country reports reveal that misleading information or too much information can be confusing and overwhelming for consumers. Poland's report highlights that consumers are confused by the numerous logos and certificates that they see on products as often they do not know what they mean. Further to this, Spain's report emphasises that the information shared on labels should be clear and used appropriately and in the right context. Spain's and UK's reports link the impact of misinformation to the role that both social media and consumers' lack of awareness and education play. These reports argue that without sufficient level of awareness, the misinformation shared on social media can shape and shift consumers' attitude and behaviour for the worse. Finland's report discusses the post-truth era arguing that too much information from multiple sources and available on various platforms can make it hard for consumers to decide whom to believe and to trust across the food industry. Further to this, this report argues that under the influence of social media, influencers and mobile platforms, younger generations of consumers have/will become more unpredictable, making it hard for the food industry to communicate with them in an effective way.

## Lack of direct contact and communication with consumers

Organisations' communication style has been highlighted as an important factor by country reports. UK's and Poland's report illustrate that organisations should take caution when communicating sensitive information about scandals and/or crisis with consumers. Italy's report argues that the size of the organisation has an impact on the organisation's ability to have direct communication with consumers, insofar that larger organisations will find it more difficult of have direct communication and contact with their customers.

# Types of organisations that are trusted by consumers

Italy's and Israel's country reports reveal that in these countries, consumers have higher levels of trust in farmers, as farmers are seen as the most vulnerable actors in the supply chain. In addition to this, Israel's report demonstrates that small companies and manufacturers are trusted by consumers as regulations place higher demand for transparency on food manufacturers. In Israel, consumers have less trust in retailers as they believe that retailers are trying to convince them to consume more and buy unnecessary products. Further to this, Israel's report reveals that those actors who are far removed from the food component are less trusted by consumers.

UK's report illustrates that some industry experts believe that large organisations and well-known brands, as well as retailers' brands are more trusted by consumers as large organisations can do a better job in assuring quality, safety and consistency, enjoy higher brand reputation, longevity as well as stronger track record and corporate governance. However, this report also demonstrates that a number of industry experts believe that smaller companies are more trusted by consumers because of their familiarity and locality. Further to this, this report illustrates that consumers trust and buy familiar brands and they expect familiar brands to continue to consistently taste the same and maintain their quality, especially when it comes to brands that have been around for a long time. In this regard, Finland's report also reveals that industry experts believe well-known brands with a good reputation are more trusted by consumers while large organisations are perceived to be less trustworthy by consumers. Finland's report also emphasises that consumers build trust based on their personal experience with an organisation.

Italy's report argues that consumers' lack of trust in the food supply chain may be driven by a general lack of trust in politics and politicians as well as consumers' general disaffection from institutes that are believed to be far removed from people and their everyday problems. UK's report, however, argues that consumers in the UK generally trust regulators as the regulations are on the right track to assure food safety and quality. Participants argued that visible regulation builds trust. However, it also demonstrates that a global crisis like the COVID-19 pandemic reveals that governments cannot guarantee the health and safety of individuals.

In Finland's report, industry experts argue that the country enjoys political/social stability and low levels of corruption and consumers perceive food control authorities to be both competent and trustworthy.

# Current industry initiatives that aim to increase consumer trust

Country reports also discussed the current industry initiatives that are aimed at increasing consumer trust. The initiatives of each country are elaborated upon in the next paragraphs.

## Finland’s country report

The current initiatives highlighted in this report are related to food labelling and sustainability. These initiatives cover the following themes:

- Food origin labels: Redefining the criteria and validation procedure to increase transparency of the meat production process.
- Sustainability.
- Human rights.
- Working with partners to find ways to decrease $CO_2$ emissions.
- Transparency.
- Improving animal welfare.

## Israel’s country report

This report demonstrates that current actions and initiatives are not primarily designed to enhance consumer trust, however, they indirectly and implicitly can contribute to consumer trust. These initiatives are summarised below.

- A team of food manufacturers’ representatives were aiming to increase consumer trust; however, this initiative has been cancelled because of the pandemic.
- One company has an app that allows consumers to accumulate points in which they can use for repurchases of the company's products, the purpose of the app is not to increase trust. However, the company uses it to communicate with customers if necessary, an action that increases consumer trust.
- During the COVID-19 crisis, all food manufacturers collaborated to reach a large joint food donation.
- In Israel, due to the labelling reform, preliminary actions were performed, such as changing and improving the composition of products. These actions have been communicated to consumers.

- Israel's report reveals that a law that imposes a fee for filing class-action lawsuits might reduce the number of lawsuits filed and, as a consequence, reduce harmful media exposure and help maintain consumer trust.
- In addition to these initiatives, Israel's country report argues that consumers' social involvement activities such as donations, volunteering increase consumers' trust.

## Italy's country report

The report talks about transparency initiatives that are being developed in the country to allow consumers to be more directly involved in the food production process. In common with research in most countries, there is a strong implicit link between increasing transparency and increasing consumer trust. This report argues that platforms similar to Booking.com and TripAdvisor would be beneficial in pushing the food industry toward more transparency.

## Poland's country report

This country report demonstrates that a number of industry initiatives are primarily aimed at distinguishing the products of a given company from the products of other entities on the market and as a by-product, increase consumer trust. However, there are also initiatives that arise in response to customer expectations. These initiatives are summarised below.

- The labelling of GMO products is one example that allows consumers to know which products are genetically modified and which are not.
- One of the initiatives that has been highlighted by report are the activities carried out by (***) and (***) located in (***) in (***). At this location, consumers can try various products of Polish companies/producers.
- Among the initiatives carried out in Poland, the initiative "Polska Smakuje" (Poland Tastes) was also mentioned during the meeting. At the moment, the equivalent of this initiative is the mark "Produkt Polski" (Polish Product), which is well-known among Polish consumers, and its success may result from the so-called consumer patriotism.
- The campaign "Czas na polskie super owoce" (Time for Polish Super Fruits) is a national survey of fruit and vegetable consumption.
- Awarding food products the "Jakość Tradycja" (Quality Tradition) certificate was mentioned as another initiative. It is a system promoting high-quality products, elaborated and developed by (***). Since 2007, this system has been recognised as the national food quality system by (***).
- The organisation of information meetings on certification is another initiative mentioned by participants. Such meetings are organised not only for food producers or other companies in the sector but also for consumers.
- Another example is an initiative in which one of the food producers cooperates with (***). An example is an apiary with beehives installed on the roof of a factory, which is looked after by the charges of the (***). This allows young people aged 15-26 to both learn to care for the environment and become familiarised with the basics of entrepreneurship with the support of the company.

## Spain's country report

This report draws upon a number of initiatives that are currently being undertaken by organisations. These initiatives cover the following themes:

- Increasing the quality of products through innovation and traceability.
- Giving clear and transparent explanation of food composition and production to consumers to increase the long-term consumer trust.
- Giving consumers clear and transparent elements they can trust, such as a quality, safety, health related elements or issues related to tasty products, based on a good traceability system.
- Turning happy customers into organisation's ambassadors.
- Having an open-door policy to allow consumers to visit the production and manufacturing sites.
- Having continued contact between consumers and organisations.
- Communicating credibility of organisation's communications.
- Communicating with stakeholders other than the final consumer.
- Taking part in documentaries and TV shows to raise consumer awareness.
- Working directly with producers to improve traceability.
- Developing research and innovation programmes about food and health issues.
- Working increasingly with compostable or recyclable packaging materials.

## UK's country report

This report draws upon a number of initiatives that are currently being undertaken by organisations. These initiatives cover the following themes.

- Formal and genuine transparency programmes, as there is power in sharing and showing vulnerability and willingness to do the right thing.
- Knowledge of societal norms and trends and standing for what is important to stakeholders and society at large, which involves a certain level of listening and co-creation with consumers. However, it is important for organisations to know which issues they are looking at, which societal movements they are going to join and what they are going to do about them.
- Giving back to the local community by creating partnerships and making a difference in the community. This initiative is useful as consumers are likely to trust an organisation more when the organisation is employing people from a local community and is also producing something that is of benefit for the wider community.

# Gaps between consumer and industry views

The ideas shared by the industry experts (summarised in the sections above) have been compared and contrasted with the views shared by consumers during the focus groups. The gap between consumer and industry views are reviewed for each country in the following paragraphs.

## Finland's country report

In Finland's report, first the key themes discussed by both consumers and industry experts have been identified, and then the topics that have been highlighted by industry experts are discussed. These themes are as follows.

- Key themes discussed by both stakeholder groups:
    - High trustworthiness of Finnish food supply chain.
    - Social and political stability and low corruption.
    - Significant role of food control authorities: Consumers placed more emphasis on third-party controls.
    - Social media and its impact on consumer trust.
- Key themes discussed by food industry representatives.
    - Transparent and open cooperation of food system.
    - High quality of self-monitoring.
    - Acceptable reaction of the food supply chain to the first wave of COVID-19 outbreak.
    - Food-related information shared by food industry (marketing propaganda).

## Israel's country report

This country report suggests consumers' views shared in the focus groups and industry views in the workshops generally matched. Industry participants were not surprised by the findings of the focus groups.

## Italy's country report

The report focusses on issues that are important to both consumers and industry. This suggests that there are significant areas of overlap between consumer and industry perspectives.

## Poland’s country report

In Poland’s report suggests that there was divergence between consumer and industry views on the following topics that were important to both parties:

- The meaning of trust in food and food suppliers for food supply chain actors.
- How to identify the initiatives that are effective in increasing consumer trust.
- Which supply chain actors consumers really trust (i.e. industry think they know, but they are not sure).
- What the impacts of the COVID-19 pandemic on consumer trust really are (industry think they know, but are not sure, especially in times that topics like locality and proximity have become salient for consumers).
- Is consumer trust of importance for organisations? Are organisations implementing consumer trust initiatives at the moment?

## Spain’s country report

Spain’s report suggests that there was divergence between consumer and industry views on the following topics that were important to both parties:

- Traceability (especially for food producers).
- How food companies and food systems work (“from farm to fork”).
- The impact of COVID-19.

## UK’s country report

In UK’s workshop report, first the key themes that are discussed by both consumers and workshop participants have been identified, then topics mentioned by consumers, which are of importance for the industry have been showcased, and finally the topics, which were solely discussed by industry experts are summarised.

- Key themes considered by both stakeholder groups:
    - Transparency.
    - Giving consumers responsibility (co-creation).
    - Need for higher levels of information/knowledge.
    - Need for a rating system.

- Topics mentioned by consumers (and that should be considered by industry):
    - Need for a more local supply chain/more local product.

        - The positive impact COVID-19 has had on consumers' levels of trust.

- Topics mentioned by industry experts:
    - Relationships with stakeholders.
    - Inconsistencies across the supply chain.
    - The approach followed in different markets.

# Opportunities for future initiatives that can improve consumer trust

Based on the identified gaps between consumer and industry views, each country report has provided a list of future initiatives that can be helpful in bridging this gap and by this means, improving consumer trust. The suggested initiatives of each report are summarised in the following paragraphs.

## Finland's country report

- Easier access to accurate and reliable information and education material concerning food and food production.
- Digital services tailored for the segment.
- Opportunities for digitalisation from the consumer experience perspective.
- Integration of technology and packaging (QR codes, augmented reality).
- Responding to an increased need for data and information related to food products and food production.
- Identifying cost-efficient solutions for these initiatives.

## Israel's country report

- Leveraging the positive impact of COVID-19 pandemic on consumer trust in the long-term.
- Increasing the transparency in the supply chain, the selection processes of suppliers, and purchase prices.
- Creating visitor centres and placing cameras in the production line to allow consumers to interact with the organisation and the production process.

- Continuation of companies' social activities to help those in need.
- Increasing the regulations in place for retailers, especially regarding retailers' pricing practices.
- Examining the impact of low consumer trust in government and health authorities on consumers' trust in the supply chain.
- Issuing a general index of corporate transparency, as everything starts and ends with transparency.

## Italy's country report

In Italy's country report, the main and general idea embraced by the majority of participants is that it is in the interest of every actor of the food supply chain to invest time and resources in promoting food culture and awareness. This will in turn allow consumers to be more active and effective in their dialogue with companies, punishing reproachable behaviours, remunerating good practices and offering direct indications about their own consumption needs, be it the taste, the safety, or the ethicality of the product.

## Poland's country report

- Creating one single label that shares all the needed information with consumers.
- Taking initiative in educating and raising consumer awareness.
- Working on campaigns that educate consumers and explains the purpose of various certificates.
- Putting more effort into translating certificates for consumers and explaining the benefits of ingredients in food, the benefits of certain types of packaging, or production technology.
- Creating a system that proves the credibility and worthiness of a certain certificate.
- Facilitating trust in old, proven brands that have a long tradition and history in the market.
- Working on unconventional social campaigns, programs and initiatives organised by the government and ministries that help increase consumer awareness.

## Spain's country report

- To give consumers real information.
- To generate confidence through reality, transparency, authenticity, and truthful information.
- To show consumers how the food products are made by real videos and interviews with real employees.
- To give consumers the opportunity to know the food production process by open-doors journeys or in a virtual way, while respecting the industrial secrets and patents.
- To share more about the primary food production with consumers.
- Obtaining a better understanding of consumers behaviour in the food consumption context, which could in turn lead to a better chance to improve food products and services.

## UK's country report

- Stakeholder engagement through transparency programmes, leading to reputation and trust.
- Development of purpose driven brands.
- Consistency, across the organisation and across the food industry.
- Reconciling the local/global actor narrative would depend on the country/market, but organisations should consider what they could do for the local community.
- Reshoring (shortening supply chain, giving it a local feel). Need to consider tensions between price and origin, in particular in times of financial difficulty.
- Rating system (by an independent body) and blockchain.

Industry workshop report (Finland)

This activity has received funding from EIT Food, the innovation community on Food of the European Institute of Innovation and Technology (EIT), a body of the EU, under the Horizon 2020, the EU Framework Programme for Research and Innovation

Janne Laine, Jari Kaikkonen & Kyösti Pennanen, VTT

7th of October 2020

# Executive Summary

An online workshop for Finnish food industry and organizations associated with the Finnish food supply chain examined the industry perspectives to consumer trust. We set out to inspect the industry views on the current drivers of consumer trust in food, discuss experiences with initiatives for increasing trust, reflect on and compare the consumer and industry views on trust, and discuss opportunities for cooperation in future initiatives on building trust.

The following were found to have positive contribution to the consumer trust in food: 1) open, transparent and agile cooperation between companies, associations and authorities, 2) stable, uncorrupted society with competent and trustworthy food authorities, 3) competent self-monitoring in the Finnish food industry to minimize chemical and microbiological risks, and 4) strong brands with good reputations based on quality products. The following were found to have negative contribution or pose challenges to consumer trust in food: 1) Sensation-seeking media emphasizing scandals and bad news related to food industry, overshadowing everyday work in food chain, 2) the unpredictability of the young generation of consumers whose consumption habits change rapidly due to social media influencers posing a challenge for maintaining trustworthiness of the food system, 3) complex world of digital multichannel communications makes it more difficult for consumers to find information that they feel they can trust, 4) consumers' and certain medias' skepticism towards food-related information disseminated by (large) food companies, dismissal of it as "marketing propaganda", 5) unfounded fears of processed food and resistance to the use of technology in food production, and 6) global food frauds and involvement of organized crime in the global food supply chain and its effect on consumers' beliefs and attitudes towards Finnish food system.

Current industry actions to improve trust include: 1) Long-term efforts to produce and disseminate reliable information on food production, and to leverage it in new ways, 2) administering a trustworthy food origin label, 3) improvement of human rights and social sustainability issues both abroad and in Finland, 4) cross-industry collaboration to reduce CO2 emissions, 5) increasing transparency across food chain, 6) emphasizing animal wellbeing through company policies.

In the big picture, the participants of the industry workshop and the participants of the consumer focus group discussions shared the view of the overall high trustworthiness of the Finnish food supply chain. Both groups considered the relatively stable society and low corruption as a solid foundation for a trustworthy food supply chain. While both groups mentioned the significant role of food control authorities in maintaining a trustworthy food supply chain, consumers tended more specifically to emphasize the importance of independent third party inspections carried out by public authorities. On the other hand, food industry representatives discussed more cooperation within the whole food system as a guarantee to maintain consumer trust in food. The largest gaps between Finnish consumers and the Finnish food industry seem to be in perceived trustworthiness of especially large food manufacturers, and to a lesser extent, large food retailers. The companies are aware of consumers' tendency to consider large companies as less trustworthy, although they think these impressions are not based on facts, since there are many actions such as strict quality assurance procedures that ensure large companies' products to be reliable and safe.

The discussion on the opportunities for future actions concentrated on leveraging existing information and educational materials on food and food production in new ways. Engaging and innovative digital services were seen as a way to build trust especially among younger consumers. Improving transparency was considered as a central goal for which digitalization could provide solutions. Integrating different perspectives to environmental and social sustainability, animal rights and human rights to one's business, and concrete actions planned together with partners were seen as other fundamental aspects of trust building.

# "Trust in Food" Workshop for Finnish Food Industry

We ran a 2-hour online workshop with representatives of the Finnish food industry and the food supply chain. The workshop was arranged in Microsoft Teams on 22nd of September 2020. The workshop followed the plan outlined by the project consortium, slightly adapted for the Finnish conditions. We started with examining the participants' views on consumer trust in the Finnish food supply chain and the current drivers of consumer trust in food, and continued with their experiences and current activities in trust building. We then discussed selected findings from our focus group discussions, and finished with further discussion and future plans.

The workshop included seven participants and three moderators from VTT (one acting as the main moderator of the discussion, the other two observing and taking notes in the background). While the discussion in the workshop was open and lively, we committed to maintaining the anonymity of the participating persons and organizations in our reporting. Thus, here we will only describe the sectors of the food industry and the types of organizations that participated in the workshop.

- A large Finnish food manufacturer
- A Finnish food manufacturer, specialized in producing high-quality food products from Finnish meat
- A large Finnish retail group
- An association representing Finnish bread industry.
- An industry federation widely representing the interests of the Finnish food and drink industry
- An association that promotes the interests of grocery trade and foodservice wholesales
- An association that promotes Finnish food and food culture by providing information about food and the food production chain, and administering a certificate for Finnish food products

All participants expressed an interest in the topic and further cooperation around it. An 8th participant, from food media, had to cancel her participation just prior to the workshop, but similarly expressed a continued interested in the topic. When preparing the workshop, we contacted dozens of persons from the Finnish food industry and the food system at large, and received other expressions of interests in the topic and future cooperation around it from persons and organizations that could not find the time for attending this workshop.

# Industry views on issues that increase consumer trust

There was a unanimous consensus among participants that the Finnish food system is very transparent, and that different actors maintain a close contact to one another and cooperate for a trustworthy food system. Indeed, most of the participants of the workshop knew one another beforehand and welcomed this chance to come together to discuss a relevant topic. The participating companies are also co-members in one or more of the participating associations. The relatively small population of the country and relatively small size of its food industry clearly has an effect on the dynamics within the Finnish food supply chain. In one comment, the fact that in Finnish food industry “everyone knows everyone” was seen as both a strength and a weakness, but mostly a strength from consumer trust perspective.

The participants described closely interconnected and cooperative network of food companies, organizations, and authorities, and saw this as a significant contributor to the reliability and trustworthiness of the Finnish food supply chain. Concrete examples of continuous discussion and close cooperation between government authorities and the Finnish food industry were given, among them the joint and smooth decision of the Finnish food industry to start using more iodized salt in food products as a response to a need expressed by the Finnish health authorities. There were other examples too such as adding certain vitamins (mainly vitamin D) to given food products (mainly dairy products), that have been smoothly implemented across the Finnish food industry simply by joint agreement with authorities, not requiring lengthy legislation procedures as in many other countries.

Another example of successful cooperation was the rapid and successful joint response of the Finnish food industry to the first wave of COVID-19 in Finland in order to ensure that food is all the time available to consumers. The participants considered that the key enabler for this success was the shared trust between different actors within the food system. At the moment of crisis, the will to solve things together and to trust one another was emphasized.

The stability and low corruption in the Finnish society, and trustworthy food authorities were considered to remain significant building blocks of trust in food in Finland. In a global level, food frauds and increasing involvement of organized crime in the food supply chain were seen as problems, which are also reflected to Finnish consumers' trust in local food system through the media coverage. However, the participants pointed out that the quality of self-monitoring in the Finnish food industry is generally high, which, together with competent food control authorities, guarantees that Finnish food is of high quality and safe, and chemical and microbiological risks are low.

Well-known brands with a good reputation were described as having a significant positive impact on consumer trust. Large, traditional food companies have an advantage from this perspective. The participants considered this to be in line with how consumers tend to build trust through their personal experiences, learning to trust companies that continuously provide good products. On the other hand, the participants also brought up the consumers' tendency to perceive large companies as less trustworthy than small companies (this issue will be discussed later in more details).

To summarize, the following aspects were seen to contribute positively to the consumer trust in food:

- open and smooth cooperation within the Finnish food supply chain among companies, associations and authorities;
- stable, low-corruption society with competent and trustworthy food authorities;
- competent self-monitoring in the Finnish food industry to minimize chemical and microbiological risks;
- strong brands with good reputations based on good quality products.

# Industry views on issues that decrease consumer trust

The participants described characteristics of both the traditional media and social media that tend in their view to paint an unrealistically negative picture of the food supply chain. The industry representatives considered both of them as having a significant role in launching trends and strengthening attitudes that are emotionally charged and critical towards the conventional mainstream food supply chain, often without sufficient basis.

The participants mentioned that there exist a long-term tendency of traditional media to seek sensations in order to sell magazines and attract clicks and viewers by emphasizing bad news. The participants did not see this as a property of overtly sensation-seeking media only, but also described increasingly critical attitudes towards food companies and products even in traditionally moderate and well-respected media channels. Personal experiences of aggressive interviewing style and seemingly unjustified criticism of newly introduced food products from some mainstream journalists emphasized this point.

In the modern and quickly evolving world of numerous social media channels, influencers, and mobile applications, new food-related trends seem to arise overnight among any given fraction of the young generation, then mold into something new or simply fade away, to be replaced with the next trend. This digitally mediated and fragmented youth culture appears complex and chaotic to the food industry representatives, and is difficult to grasp, understand and communicate with. As a concrete example of the unpredictability of the food-related trends that can arise out of the digital networks inhabited by future consumers and social media influencers, recently a food product (a turkey sausage!) rapidly became the focus of a trend in digital social networks of young consumers. As a result, the grocery store and supermarket shelves in Finland were soon bought empty of these products, a sudden rise in demand that food manufacturers and retailers were not able to forecast and prepare for.

Generally, the consumer segments and their needs are becoming increasingly fragmented and divergent. Likewise, the number of communication channels is increasing, posing challenges for trustworthy marketing and sales. From the consumer perspective, it becomes more difficult to find information that they feel they can trust. Digital solutions are often offered as solutions to evolving and divergent needs of consumers in the more complex world of multichannel communications. In the context of more fragmented and divergent consumer segments, our participants also discussed the concept of “hybrid consumers”, the consumers that swiftly migrate back and forth between manifesting different values and attitudes in their behavior. For example, hybrid consumers can generally seek for inexpensive food products and services, but may on other occasions opt for expensive premium options. This kind of complexity makes it more difficult to answer consumer needs, which may pose challenges to consumer trust in food.

The strengthening environmental awareness and activism associated with demands for concrete actions against climate change seems to be a significant driver of critical attitudes in the traditional media and social media that can decrease consumer trust towards food and food companies. The colloquial term “green girls”, as referred by the industry representatives, meaning a segment of the young future consumers that strongly emphasize environmental issues and animal rights in their values and attitudes. The participants used “the green girls” as an example of a strong and more persistent trend arising among the young generation that strengthens attitudes that are critical towards the mainstream food industry.

From the perspective of food industry, the companies are embracing environmental sustainability and environmental values in their business, but feel that some journalists and consumers, who might be partly misinformed and not see the bigger picture, judge them too harshly. As an example, a participant from food industry described how even large newspapers in Finland, which still have a considerable influence on consumer attitudes, routinely use global numbers when discussing environmental effects of food production despite the local numbers for the environmental effects of Finnish food production (which are favorable to the Finnish food industry) are widely available. Some participants saw intentional smearing of the food industry in the seemingly sensationalist handling of environmental issues by some journalists.

A participant discussed how this rhetoric of “not doing enough” to combat climate change and save the natural environment even seems to lead to a degree of self-censorship of their virtues among the food industry. The food supply actors seem to be reserved and perhaps too cautious of publicly spelling out the good things the actors have accomplished, because of fearing the increasingly common criticism for “not doing enough for environmental sustainability”. This can lead to a self-reinforcing cycle where the virtuous actions by the food industry are overshadowed by the views that what they do is not enough.

The participants were aware that consumers perceive big companies less trustworthy than the small ones. For example, consumers tend to assume that small bakeries emphasize high quality, while large bakeries are more inclined to cut costs in their materials and processes. This is in line with the tendency of participants in our consumer focus groups discussion to perceive individual farmers more trustworthy than large food manufacturers, for example. In words of one participant, this needs to be taken as an existing psychological effect that cannot be completely overcome, but is something that large companies need to live with and take into account in their initiatives and actions. However, this perception was seen to be biased and in many ways incorrect, as large companies have many qualities and activities that should make them more reliable and trustworthy, e.g. larger resources for quality control, long experience, and finely tuned production processes.

Related to the consumers’ tendency to view large companies as less trustworthy, the consumers also tend to view the communications from large companies as marketing propaganda, with business goals of aiming to make consumers behave in a given way. A representative of a large food company expressed sadness towards this seemingly common skeptical attitude, since she was herself involved in what she sincerely considered as production and dissemination of fact-based information on food and nutrition, not simple marketing propaganda.

The participants also expressed some frustration to the fact that while consumers generally like new technological advances, in the context of food new technologies have a bad connotation. Consumers tend not to see the benefits of food processing, for example, perceiving them as unhealthy, although processing can in fact add many desirable qualities to food products whilst removing the undesirable ones. The food industry representatives considered consumers’ view as being connected to the previously described tendency to view smaller companies as more trustworthy than the larger ones. The emotionally charged picture of a baker in a small company working with his hands on flour seems appealing consumers, although in larger companies automation can accomplish the same results, with even more reliable and safe manner.

While not so in Finland, the participants considered food frauds and involvement of organized crime in the global food supply chain as a significant global problem. They considered food origin frauds to be an increasing problem globally, and one that also affects the Finnish food supply chain and consumer trust in Finland, which has increased the need of reliable origin labels.

In summary of this section, the following were seen to contribute negatively to the consumer trust in food, or pose challenges in maintaining consumer trust:

- Sensation-seeking media emphasizing scandals and bad news related to food industry, overshadowing seemingly mundane everyday work for reliable and trustworthy food supply.

- The unpredictability of the young generation of future consumers, with rapidly arising trends and fragmented segments in the world of numerous kinds of social media influencers and mobile platforms is a challenge for maintaining trust in food industry.
- Numerous digital platforms with varying content in communication makes it difficult for consumers to find information that they feel they can trust
- Strengthening environmental concerns and increased urgency to combat climate change leads to unjustified views on mainstream food production among some journalists, influencers, and consumers. Sensationalist journalism sometimes intentionally misinterprets the environmental effects of the Finnish food industry. The view that the food industry is not doing enough overshadows many concrete actions that it has taken to make food production sustainable.
- Skepticism towards food-related information disseminated by (large) food companies, dismissal of it as “marketing propaganda”
- The view that larger companies are inherently less trustworthy
- Unfounded fears towards processed food and use of new technologies in food production
- Globally, food frauds and involvement of organized crime in the food supply chain

# Industry initiatives that are currently set out to improve trust

The participating associations described long-term efforts to produce and disseminate reliable information on food production. These include for example study materials that have been used in schools. Some of this material, such as questionnaires on food and production, is available on informational web sites aiming to uphold high levels of trust in food. The associations also actively communicate in social media and are seeking new ways and opportunities to use the available materials.

One of the associations that participated the workshop administers a food origin label that has become one of the most appreciated brands in Finland. In order to increase the trustworthiness of the label, the association is currently redefining the criteria and validation procedures that product and production processes must fulfil in order to meet requirements for label use.

Food companies described plans to establish their own labels as trust guarantees. These include, for example, labels for increasing the transparency of the meat production process, and labeling of the origin of the meat. Actions to improve openness and transparency were generally mentioned in many occasions.

From the perspective a large retail chain, sustainability is pursued from many perspectives in close cooperation with food producers and other partners:

- Human rights and social sustainability issues both abroad and in Finland
- Passionately working with partners to find ways to decrease CO2 emissions
- Working to find ways to be as transparent as possible
- Improving animal wellbeing

When contrasting consumers' views, which they expressed in the focus groups to food chain views, a retailer commented that animal wellbeing is the main issue to tackle. The retailer has defined a policy of emphasizing animal wellbeing in their business and have initiated discussions with food producers on how to best improve the animal conditions. Concrete actions are emphasized in building trust, and practical impact to improved animal wellbeing is seen to directly benefit them as a company.

# Gaps between consumer and industry views

In the big picture, the participants of industry workshop and the participants of consumer focus group discussions shared the view of the overall high trustworthiness of the Finnish food supply chain. Both groups saw the relatively stable society and low corruption as a solid foundation for a trustworthy food supply chain. While both groups mentioned the significant role of food control authorities in maintaining a trustworthy food supply chain, consumers tended to emphasize more specifically the importance of independent third party inspections carried out by public authorities. The food industry representatives, on the other hand, discussed more about the transparent and open cooperation within the whole food system, including government authorities, as a guarantee of the continued trustworthiness of the food supply chain. The food industry representatives also emphasized the good quality of self-monitoring in the Finnish food chain, something that the consumers did not explicitly mention.

Both consumers and the industry representatives expressed that the Finnish food system had handled well the first wave of the COVID-19 and the subsequent rise in demand of food. The industry representatives thought that the experience of COVID-19 had even strengthened the Finnish food supply chain, and increased its trustworthiness. However, the food industry representatives were interested to learn from the consumers if and how the actions of healthcare authorities during the pandemic might have reflected to the trust in food authorities.

While consumers in Finland have a relatively high level of trust towards the Finnish food supply chain, there seems to be some lack of trust, or at least skepticism, towards food companies (esp. towards large food manufacturers). The industry representatives considered that some consumers might categorize most food-related information from large food companies as "marketing propaganda". The participants felt this potential skepticism is mostly unjustified in the case of Finnish food companies, who aim to provide reliable information on food and nutrition. However, they perceived the psychological tendency to see larger companies is something that they just need to accept as a fact and deal with as best as they can in their strategies and communications.

While consumers have some misgivings about the effects of social media, in focus groups they reported it more as an opportunity to build trust e.g. by peer-reviews and consumer ratings of food products and services and companies. While food industry is active in social media, they see especially digital social networks of young (future) consumers, with their influencers and rapidly rising trends as complex and hard to grasp.

# Opportunities for future initiatives that could improve consumer trust

The consumers considered that easier access to accurate and reliable information and educational material concerning food and food production could be an effective way to counteract the possible distrust. Food industry representatives shared the view and agreed that this is a potential avenue towards maintained trust. They were also delighted to hear that some of the consumers in focus groups expressed willingness to educate themselves in matters related to food and food production and supply. However, the ongoing challenge is to find new ways to use and better leverage this informational and educational material in the quickly evolving digital world.

Especially for future consumers, digital services tailored for the segment were seen as potential ways to increase trust. Opportunities for digitalization need to be considered from the consumer experience perspective. Opportunities and challenges for digitalization include:

- integration of technologies to consumer packaging, e.g. QR codes, augmented reality
- need for data and information related to food products and production keeps increasing
- solutions must be cost-efficient

This activity has received funding from EIT Food, the innovation community on Food of the European Institute of Innovation and Technology (EIT), a body of the EU, under the Horizon 2020, the EU Framework Programme for Research and Innovation

University of Warsaw, Faculty of Management, Faculty of Sociology

EIT Food – Making Food Innovation Happen

Knowledge & Innovation Center on Food,
part of the European Institute of Innovation and Technology (EIT)

# Executive Summary

One of the key research tasks in 2020 under the project "Increasing consumer trust and support for the food supply chain and for food companies" (EIT Food / Horizon 2020) was a complete organisation and implementation of practical and substantive workshops for leaders of the agri-food sector and representatives of industry organisations.

Initially, the workshop was planned in the form of a traditional meeting at the headquarters of the Faculty of Management at the University of Warsaw, but due to the COVID-19 pandemic, the workshops were conducted online via the Zoom platform.

## Organisation of workshops - following steps

- Preparation of the database of enterprises and institutions and identification of key people from the companies mentioned above (middle or senior/high-level managers, leaders, authorities) that were invited to the workshops.
- Preparation of the invitations, a detailed program of workshops, documents and consents regarding the processing of personal data (GDPR).
- Sending via e-mail the invitation to the workshop and the general outline of the program with a request for confirmation of participation.
- Telemarketing and follow-up of invited people.

- Collecting confirmation of participation and documentation related to the processing of personal data (GDPR).
- Sending via e-mail thanks for interest in the workshop and application for participation.
- Preparation of the final list of invited and confirmed guests and division into two workshops groups.
- Preparation of the presentation with information about the project, workshop and preliminary results of the focus group research.
- Sending the invitation with a link to the Zoom platform.

## Implementation of workshops

- In Poland, two parallel workshops were conducted for representatives of the agri-food sector and its stakeholders.
- The workshop participants were mostly senior/high level and middle-level managers (presidents, directors, managers).
- The workshops were conducted following the prepared program and the agenda planned and sent to the guests.

A brief description of the workshops and information about the participants is presented below in point 2.

## Summary and completion of the workshop implementation process

- Sending via e-mail of thanks for participation in the workshop and the presentation presented during the meetings.
- Preparation of personal certificates signed by the Faculty of Management and the Faculty of Sociology of the University of Warsaw for each participant and their sending.
- Expressing hope and a proposal for non-binding continuation of cooperation within the project and its development in the future.

## Comment and general conclusions

The concept of trust in food is not well-established in Poland. It is visible mainly in the lack or very little number of initiatives and superficial understanding of trust, without referring to one's own perspective (obviousness, generics, the matter of one's personal experience has appeared, but in a few cases, several times through the prism of professional activity).

Intuitively, it can be assumed that there is also a lack of well-established consumer knowledge, a lack of knowledge about industry initiatives from outside one's own activity. Well-established knowledge is what happens as a part of corporate/institutional activities - certificates, consumer expectations (as far as actual expectations, to what extent is a PR vision of expectations, created for certification systems).

Rather smooth phrases "we try", "it seems" "difficult to say" than well-established knowledge - a careful conclusion that we are moving in slogans.

The most active participants were representatives of certifying institutions and market leaders, i.e. large industrial / producer corporations, the knowledge passed on came from experience. However, as above - it is not known to what extent it is a perfect picture, to what extent is the analysis results.

In motivations, gathering knowledge is more visible (more knowledge will never hurt) than sharing comments and observations. More in the form of declarative sentences than polemics, referring (also because there were no controversial issues). The hypothesis from the FGI study - we do not think about trust daily, even if we deal with it in our professional life.

Nevertheless, despite the above conclusions, market leaders are increasingly focusing on consumer trust and deepening this aspect, which is reflected, among other things, in building relationships with the consumer, e.g. based on the long-standing tradition of the company, or the implementation of the corporate social responsibility strategy, i.e., CSR (based on participants' statements during the workshop).

Another important, if not the most important, conclusion after the workshops is the participants' unanimous opinion that the clue/essence of building and increasing consumer trust is in consumers' education and deepening their broadly understood awareness, as well as establishing and developing relationships with them through innovative (bored with classic forms of advertising) channels and tools.

Development of the above-mentioned general conclusions is in the further content of the report, in its specific sections.

Despite the time of the pandemic and the doubts accompanying the organisation of the online workshops (whether this form will fulfil the task, achieve the goals, will it be successful, etc.), the task was successfully, and it satisfied both for the organisers and participants.

A valuable result of the workshop is the fact that some of the participants showed a keen interest in continuing the non-binding cooperation within our project in the future, which we called "joint journey of the science and practice duo".

A detailed summary of the workshops can be found below in the report.

# Summary of participants and timings of workshops

To participate in the workshops were invited representatives of approximately 60-70 companies and institutions and our internal (business) contacts, including farmers, producers' associations, chambers of commerce, and NGOs connected with the food industry. Ultimately, 14 representatives of the agri-food supply chain entities participated in the workshops.

Two workshops were held at the same time. According to the plan, the meeting was to last about 2 hours (from 11:00 to 13:00) via the Zoom platform.

## Workshop 1. Composition

Moderator: dr Magdalena Klimczuk-Kochańska, University of Warsaw, Faculty of Management
Rapporteurs: Monika Strupiechowska, University of Warsaw, Faculty of Sociology

Workshop no. 1 was attended by representatives of the agri-food sector, who hold positions in their organisations as shown in the table below. In total there were 8 representatives of the food supply chain.

| | |
|---|---|
| President/Chairman of the Board | Bio/organic food producer - fruit growing and processing |
| Junior Food Safety Manager (Quality Department) | Food services and facilities management company (outsourcing company |
| President/Chairman of the Board | Certification company - certification of entities operating in the field of organic farming |
| Director of development of new products for the Polish market | Producer and farmer of salmon |
| President/Chairman of the Board | Certification company - certification of food products, organic farming, regional products, vegan products |
| CEO | Trading, distribution and production company in the dairy industry |
| Company employee – Manager | Strategic consulting organisation |
| Marketing Department employee | Dairy producer |

Table 1. Participants of workshop no. 1

## Workshop 2. Composition

Moderator: dr Mikołaj Lewicki, University of Warsaw, Faculty of Sociology
Rapporteurs: Magdalena Supińska, University of Warsaw, Faculty of Management

Workshop no. 2 was attended by representatives of the agri-food sector, who hold positions in their organisations as shown in the table below. In total there were 6 representatives of the food supply chain.

Table 2. Participants of workshop no. 2

| | |
|---|---|
| Key Account Manager | Audit / Certification company, an organisation promoting the idea of Fair Trade |
| Company employee – Manager | Organisation operating for sustainable development and environmental protection, responsible consumption and production as well as respect for human rights and environmental protection principles in business |
| Company employee | Producers association |
| PR Account Executive | Confectionery company, producing many varieties of chocolates, cakes, and snacks |
| Marketing Department employee | Dairy producer |
| Marketing Manager | Dairy producer (other than above) |

The workshop has been followed by the workshop guide. The primary outcomes of these discussions are presented below.

# Industry view of issues that currently INCREASE consumer trust

- Representatives of the organisations from the sector directly agreed that **the knowledge about consumer trust is generally quite small.**
- Doubts arose at the beginning of the workshops as to what consumer trust really is. It was considered to what extent the purchasing behaviour of consumers is related to trust, and to what extent it is related to habit. **Trust is a matter of the relationship** between the consumer and the food producer.
- According to the workshop participants' opinion, just a few years ago, good advertising was enough for the consumer to have an idea about the product and on this basis to shape his trust in a given organisation. However, significant changes in this area are currently visible. First of all, it is noticed that **the public knows and wants to know more and more**. More and more consumers began to **read labels, check the content of various ingredients** in the product. Consumers pay attention to which ingredients in the food are healthy, and which are unhealthy and undesirable. More and more consumers are also **interested in the production process.** Being "closer" could undoubtedly bridge the distance between the consumer and the producer and thus increase trust.
- The fact that consumers know more and more makes them try to inquire, learn different things. Previously, there was even no contact with the customer, e.g. in the case of distribution

companies. Consumers did not come to this type of companies, did not ask questions. It is changing now. Consumers themselves seek contact with the company. They inform about possible problems with a given product. They submit inquiries about the product. This activity goes beyond the usual complaint activities. Representatives treat such changes in the sector as changes for the better. **Increased knowledge and higher consumer awareness** are assessed as positive.

- Entrepreneurs point out that the increased consumer interest in what is happening in the food sector companies and in the products they offer **is associated with higher consumer access to information.**
- During the workshops, it was noticed that consumers are more and more willing to share information on social networks. **Social media,** friends on Facebook and Facebook groups and recommendations are the best information channels that consumers use. Everyone is looking for information on what to buy, why to buy it and where to buy it.
- An essential aspect that consumers pay attention to more and more often is **the protection of the natural environment** and the organisation's attitude to this issue. For example, there is a growing tendency for consumers to pay attention to food waste, which is created in stores or at the food producers.
- There is a growing trust in small, family-run businesses, which are often ecological factories with an ecological mission. In this case, the local and regional product is often important.
- **Ecology in the perception of the mainstream consumer** ceases to be an enigma. More and more people pay attention to whether the product is organic, where it comes from, how it was produced. It is evidenced by the fact that in the past, organic stores were niche, and now even supermarkets have entire sections with "eco" products, or separate vegetable and fruit stands with products from organic farming.
- In the case of animal breeding producers, more and more consumer interest is aroused by the way a **given organisation treats animals.** One of the participants of the meeting emphasised that this topic was not of any importance to most consumers a few years ago.
- These issues are linked by **CSR**, which, according to the participants of the meeting, should be an integral element of company management in line with the principles of CSR strategy. Examples such as responsible and sustainable production, reliable communication, paying attention to social aspects, building relationships and environmental protection.
- Generally, there is a kind of evolution in changes in the area of consumer trust in the sector. It was found that in the next 10 years, one can only guess that these changes will be even more far-reaching. The key trend that emerges is the expectation of **much greater transparency**. If an organisation is not transparent, it is challenging to trust it.
- **Honesty** in the broad aspect of providing information and the offer is also critical, as well as credibility in messages: good quality for a reasonable price and offering it (value for money).
- The response of entrepreneurs to such challenges on the part of consumers is the need to mobilise higher forces in terms of **improving the quality of products and offering the consumer other values related to the product**. It is crucial because if it turns out that the purchases do not meet the requirements, it is very likely that consumers will share this negative information with a broader group of friends. It was also emphasised that **sharing negative information is more frequent and faster** than in the case of positive news, even if the consumer buys something that is nice and tasty.
- It is also related to **communication with the consumer** (not only through the banal, today, advertising on TV, radio or the Internet). This aspect must be included in this global transparency strategy.

- The workshops' participants recognised that the **product packaging** and what should be included on the packaging play an essential role in building consumer trust, i.e. certification symbols, information on the sources of origin of raw materials, or a QR code that can be scanned and, for example, connect virtually with the producer of a given raw material, e.g. cocoa beans or coffee, and read more information, and thus be "closer" to the process and individual chain actors. However, the packaging cannot have "epics" - long, unclear text; text in a small font that the consumer cannot see. Instead, they should be markings regarding specific certificates, QR, pictograms, etc. In this aspect, attention was also paid to the combination of global and local, which seems to be very important for consumers, i.e. chocolate made with cocoa from a distant country, but, e.g. sugar from local producers.
- From the consumer's point of view, according to representatives of companies in the sector, **the form in which the complaint is processed** is important. If a given organisation or distributor or a restaurant, honestly takes into account the complaint and talks with the customer, there is a good chance that the consumer will return to this supplier. However, if the company ignores the complaint and the company is not interested in the customer's opinion, the customer may never return to this organisation. A lot depends on the company's contact with the client and how it works.
- In the case of producers from the sector, there is **a growing interest in product certification.** First of all, it concerns producers and processors who want to prove themselves to the consumer. Thanks to this, such companies increase their sales. It is noted that there is a growing interest in the certification of vegan products. There is also considerable interest in organic production and organic food. More and more companies are starting certification. Especially the period of increased morbidity related to COVID-19 caused people began to look for alternatives to the pharmaceuticals they take, in the form of consuming high-quality food. It was also noted that the younger generations of consumers are particularly interested in this type of product. The sign informing de facto about the status of this product, confirming that it is an eco-friendly or vegan product, is quite well received by consumers.
- Certification bodies of various kinds are gaining in importance, and consumers are increasingly paying attention to issues closely related to sustainable and responsible production, or even more broadly, to the sustainable operation of enterprises. It is indicated, among others, by the fact that certifying companies conduct research focused on the recognition of the certification mark by consumers, that is, how and whom consumers trust (e.g. Fairtrade).
- It has been noticed that now the loss of the certificate may mean the closing of the company. A large company will not risk starting with a product that has not been adequately tested and fully certified. The conscious consumer looks at the label, and the product must conform to the label.
- It has been pointed out that there is increasing customer trust in the control and operation of certification and inspection organisations in the food sector. It is because **consumers attach growing importance to the quality of the product**, and this is associated with the company's reputation in the eyes of the consumer.
- During the workshops, it was emphasised that a few years ago the producers from the sector were very much defended against joining the certification systems since an inspection must take place. It was difficult for them to understand that the control is for their safety, to eliminate all kinds of contamination, all types of imitation of products. Food producers realised that this control helps and builds consumers' trust. They realised that the control serves to develop their brand and ensure that this product is indeed original.

The participants of the meetings noted that the ability **to build relationships with the consumer** is vital in consumer trust in the sector. It can be done in various ways that were presented during the workshop:

- It was pointed out that building trust requires a lot of patience and a lot of humility. Talks with the client and the consumer are needed. Particularly important for the consumer is the fact that there is a producer behind the product - a man who is emotionally connected with his product.
- In the case of stores selling food, the relationship with the customer is very important, which is already created when the customer enters the store. It was noted that the customer comes to the store and let someone smile pleasantly; this has a positive effect on the customer.
- In the case of food producers, it is crucial to apply the **principle of "try, see, touch"**. For this purpose, some food producers, for example, open fair stands where dishes are prepared by professional chefs from given raw materials, semi-finished products sold by a given company.
- Another form of bringing the food producer closer to the consumer are activities involving **direct contact between the customer and the company in its area**. For example, farmers are increasingly allowing picking strawberries and raspberries on their own in the field. Whole families eagerly take advantage of such opportunities, especially those with young children. This way, it is easier to convince a child to eat a fruit or a vegetable, because when he breaks it himself, it tastes different. When a child pours juice by himself, he or she is more likely to drink it. The same is true when the company decides to bring the production process closer to the consumer. For example, one of the production companies (whose representative participated in the workshops) allows you to see what the product looks like several times a year (not directly in the production hall due to restrictions and standards). Production lines and the production hall can be seen through the special wall glass. In the customers' opinion, it is something exceptionally unique and is very popular. It shows that the consumer likes to see and know how something is made and produced. On this basis, one of the workshops' participant also concluded that it would become more and more critical in the food industry. On the one hand, due to the hygiene and safety of products that are important for consumers, and on the other hand, due to the growing awareness and seeking information about it, including how modern technologies are used to ensure the highest safety and quality.

# Industry view of issues that currently DECREASE consumer trust

- The participants of the meeting pointed out that consumers certainly **do not trust organisations they have been disappointed with**. If a consumer buys a product and it is not as expected, has some disadvantages, then the consumer will not reach for this product for a long time.
- It has been pointed out that **the consumer is confused and lost in the context of various certificates**. First, there are a lot of them. Secondly, the consumer often does not know what they mean. Producers know what certificates are and what certificates exist in their industry.

The certificates are, however, much more a response to the requirements of distributors, retail stores that buy products from producers.

- However, on the other hand, it is recognised that perhaps the reason for the so far limited use of this type of activity is that both certification bodies and governments **often do not have adequate human or financial resources** to explain these certificates to the consumers better. Interpreting the need to use certificates is crucial because it can have a positive impact on consumer trust in these certificates.
- It has also been noticed that **consumers are already overloaded with advertisements that do not carry anything with them, apart from manipulating the tastes of customers.**
- The respondents pointed out **that temporary crises are undoubtedly a threat to building trust**. But it is indeed temporary, because often the consumer quickly forgets about the crisis and returns to the daily routine, and the motivator for this return is the low price, and very often also the curiosity and inquisitiveness of the causes and effects of the image as mentioned above crisis (not to be confused with the current pandemic situation).

# Industry initiatives that are currently set out to improve trust

- According to the opinion of the participants of the workshop - the initiatives are very different. Some initiatives are successful; others are not. Whether the action works depends on the consumers who buy the product.
- These initiatives **are primarily aimed at distinguishing the products of a given company** from the products of other entities on the market. It is essential because, in times of globalisation when we are flooded with products from all over the world that are of different quality and are the highest quality and deficient quality products, the consumer simply has to find a product for himself.
- There are also initiatives of enterprises from the sector that **arise in response to customer expectations**. An example of an action that refers to consumer trust is the **labelling of GMO products**. It is a response to the expectations of customers who wanted to know which products are genetically modified and which are not. It is important for consumers, even though various studies, researches are carried out on whether a GMO is good or not, and there is no evidence of a negative impact of GMO products. The consumer should not be afraid of anything, but the message is clear - we want to know which products are GMO-free and which are not. It was also noted that there is a law in Poland which allows the consumer to read whether the product is GMO or not, whether it contains a GMO ingredient or not.
- The initiative to which the participants of the meeting often returned were the activities carried out by (***) and the (***) located in (***). At the bazaar, consumers can try various products of Polish companies/producers.
- Among the initiatives carried out on (***), the initiative **"Polska Smakuje"** (Poland Tastes) was also mentioned during the meeting. It was popularised at various national and international fairs. Currently, the equivalent of this initiative is the mark **"Produkt Polski"** (Polish Product). It is entirely known among Polish consumers, and its success may result from the so-called consumer

patriotism. It was also emphasised that from the producer's point of view it is not easy to obtain such a mark, because it shows that the product contains at least 80% of domestic raw material.

- The campaign **"Czas na polskie super owoce"** (Time for Polish Super Fruits) is a national survey of fruit and vegetable consumption.
- Granting the products the "**Jakość Tradycja**" (Quality Tradition) certificate was mentioned as another initiative. It is a system promoting high-quality products, elaborated and developed by (***). Since 2007, this system has been recognised as the national food quality system by (***).
- Among the activities carried out by the organisations responsible for certification, **the organisation of information meetings on certification** was mentioned. Such meetings are organised not only for food producers or other companies in the sector but also for consumers.
- Another example is an initiative in which one of the food producers **cooperates with (***)**. An example is an apiary with beehives installed on the roof of a factory, which is looked after by the charges of the (***). Young people aged 15-26 learn in this way to care for the environment and the basics of entrepreneurship with the support of the company.

# Gaps between consumer and industry views

Table 3. Key points coming from Polish workshops

| Themes | |
|---|---|
| 1: Meaning of trust in food and food suppliers for supply chain actors | • The concept of trust in food is not well established in Poland.<br>• There were no attempts to define trust in food and the supply chain during the workshop. It was taken for granted. On the other hand, there were doubts to what extent consumers' actions are a sign of habit and to what extent trust in the sector.<br>• Companies have little knowledge about consumers and their trust in the sector, but company representatives are aware of the fact that consumers know more and more and want to investigate and learn different things.<br>• Consumers more and more often seek contact with companies themselves and inform about problems with the product. |
| 2: Trust in food supply chain actors | • According to workshop participants, consumers trust farmers more than, for example, retail chains. It may be due to the frequent direct relationship with the supplier of products directly from the field, the greenhouse. It gives the opportunity to talk during the purchase, so here the element is building trust between the producer and/or supplier and the consumer.<br>• A face-to-face relationship is significant, including, for example, talking/conversation |

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|---|---|
| | with the seller during purchase, with the farmer or the food producer.<br><br>• It is noticed that consumers more and more often pay attention to the actors of the supply chain, such as distributors. Although consumers do not have direct contact with them when purchasing a product, they are more and more willing to establish this contact and ask distributors, for example, about the origin of the product, its composition, procedures related to transport.<br><br>• During the workshops, it was repeatedly pointed out that the consumer trusts state, public regulators, such as (***) or commercial inspections, but also all kinds of sources of information, such as food portals, or bloggers and influencers popular today.<br><br>• According to representatives of the sector, the consumer certainly trusts supranational organisations that regulate the(***). However, he does not perceive them directly. For example, organic farming and its rules are very closely related to the EU system. There are relevant EU regulations and regulations that the farmer has to follow. The consumer does not have direct contact with it, but he sees the result, which is, for example, labelling with the organic food mark, and he is guided by this mark when making purchases. Generally, therefore, the consumer, apart from the prices, may not have any awareness of the level which, for example, is related to the food certification system. |
| 3: Trust in times of COVID-19 | • The pandemic has shown that in any crisis, the aspect of trust is critical. And although it is difficult to talk about what is most important for the consumer in the times of COVID-19, there are trends regarding, among others, increasing the importance of proximity, producer and product locality. We can also see that consumers are looking for information and signs that show them that they can trust a product.<br><br>• Industry representatives noted that, on the one hand, consumers in the times of COVID-19 must eat as usual, but during the pandemic, customers turned to products with higher quality values. The increased interest in organic production and organic food is particularly visible. In other words, people began looking for alternatives to the pharmaceuticals they take, in the form of just buying and consuming high-quality food.<br><br>• It was pointed out that showing consumers the information that a given company has ensured the continuity of production translates into unchanged availability of products on the market and could significantly increase trust.<br><br>• Another alleged positive effect of the pandemic, influencing the excellent perception of the company, and thus the increase in trust, may be various types of initiatives, such as donating products by producers to hospitals or other organisations that asked for help. |
| 4: Industry initiatives to | • Industry representatives believe that such initiatives are primarily intended to distinguish a given product. It is mainly to benefit the company that sells more of |

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|---|---|
| increase trust | the product.<br><br>• On the other hand, according to representatives of the sector, initiatives taken by enterprises respond to the expectations of consumers who want to have certain product features confirmed.<br><br>• These are mainly initiatives regarding product certification, which lead to the use by a given company of the mark confirming the quality of a given product. Other initiatives are rarer and less significant. |
| 5: What do organisations know about consumer trust? Is it necessary for them? Do they know and implement initiatives in this area? | • We can see limited activities of the sector entities in terms of increasing consumer trust.<br><br>• There is a superficial understanding of trust without referring to one's perspective. It was taken for granted, and the workshop participants usually related to their personal experience of being a consumer as well as presenting the statements through the prism of their professional activity.<br><br>• From the statements, it can be concluded that there is also a lack of well-established consumer knowledge, lack of knowledge about industry initiatives from outside one's own area of operation. Established knowledge is what happens as part of a company/institutional activities - certificates, consumer expectations. Based on the statements, it is difficult to assess to what extent these are the real expectations, to what extent is the PR vision of expectations, created for certification systems, etc.<br><br>• Nevertheless, in general, according to the respondents, it is crucial to educate the consumer and build good relations with him. |

# Opportunities for future initiatives that could improve consumer trust

- For industry representatives, it is crucial to conduct initiatives in the area of increasing consumer trust.
- The workshop participants also pointed out that companies can organise various types of actions and initiatives not only on their own but also in cooperation with other entities.
- The need to monitor consumer trust in the activities of enterprises in the sector was emphasised.
- Industry representatives count on the emergence of various initiatives related to consumer trust in the sector. They want to raise their level of knowledge on this subject in order not only to sell a product or service well but also to be well assessed by consumers. They expect the initiatives

to show a **mechanism on how to increase consumer trust. They also hope that such initiatives will also help them better understand consumer expectations of their products or services.**

- Among the statements of the workshop participants, there was an expectation that there would be **one type of labelling of food products** that would tell the consumer everything about this product. The consumer will not have to look for any additional information, because if he knows what this sign means, he will understand that the product is worth recommending. Such a warning should be visible to people of all ages, including the elderly.
- There is a need to take the initiative to **further train and raise awareness of consumers**. It is important because many producers target their offer at conscious people who know what they want to eat and what is right for their body and health.
- As shown by the experience of the sector, for example, related to the HACCP certificate, which used to be something mysterious, incomprehensible, and now has become a standard in food production. The same happens with the specification of an organic product, for example. Some people trust it more or less, but it is much easier for the company to enter global markets when the company is certified. Therefore, campaigns that educate and explain the purpose of various certificates are needed.
- Representatives of companies agree that more **effort should be put into translating certificates, the benefits of ingredients in food, the benefits of using a given type of packaging, or production technology in a way that will be "user friendly"**. It should help consumers find their way around all the issues and information they are currently very confused about.
- It is also important to prove the credibility of a given certificate because there are so many different certificates on the market today that consumers do not always believe and trust the certification system.
- It is important to build and, above all, maintain trust-based on tradition, **consumers trust "old", proven brands** that have a long tradition on the market, and this should also be taken care of.
- In general, the workshop participants raised the topic of **the need to educate consumers** on many occasions. It should be the education of every consumer, especially the less aware, mainstream one. It is indispensable for unconventional social campaigns, programs and initiatives organised by the government and ministries.
- There may also be activities such as **the launch of an internet communication platform**. However, respondents believe that this could be an exciting challenge, but it would have to be accessible to everyone and highly verifiable by everyone – both, by all actors in the chain and by consumers. The point is for both parties to be treated fairly, with the same rights and fair. The platform would also have to be original, unusual because nowadays there are so many different types of platforms and applications, so it is essential not to be boring, not to "get lost in the crowd and overwhelm".

# Other comments

- Interesting topics were mentioned among the reasons for participating in the workshop. Most of the meeting participants pointed out that they had never attended events directly related to the subject of consumer trust.

- Many participants of the meeting hoped to obtain information on what trust looks like from the perspective of the consumer, including that more research results will be presented during the workshop.
- The participants of the meeting, even though they were invited to participate in the workshop from the very beginning, were mostly surprised that it was not training, a webinar. Some referred to the term "focus study" during the workshop. Therefore, it can be concluded that the workshop formula of the organised workshops was not entirely clear to them. Although the information about the discussion and exchange of views during the workshop was included in the invitation to the workshop, the participants of the meetings were surprised by invitation to discuss and express their opinions.
- During the meeting, the respondents turned off their cameras, did not speak; it was difficult to encourage them to discuss. They did not even want to share their own opinions, which was probably also due to their low level of knowledge about consumer trust in the sector entities. The results of the workshop confirmed such suspicion.
- The online workshop formula also had its positive sides. Online workshops allowed for gathering people from the sector "in one place". According to the review of positions held by respondents in their organisations, they are very often people in senior, high-level positions, quite busy. Moreover, the companies and institutions they represented are located in various cities/towns (a trip to Warsaw would generate time and undoubtedly money, etc.). Therefore, under normal conditions, it would be difficult to invite these people to participate in a free workshop.
- It should also be noted that representatives of several entities in the sector, although formally volunteered to participate in the workshop, filled out the documents related to the GDPR, but did not appear at the workshop without any additional information. There was also no apology to the organisers.
- The representatives of organisations supporting the sector, associating producers, certifying products, etc., showed greater interest and involvement in the workshop. In this case, the presidents or vice-presidents themselves, interested in the subject of the workshop, usually came to the meeting. Representatives of manufacturers - companies were less interested in participating in the workshops; they were somewhat secretive; it was more challenging to encourage them to join the discussion. It may be because they were usually people representing quite narrow job positions, not sufficiently related to CSR or organisation promotion.

# Industry workshop report (Spain)

This activity has received funding from EIT Food, the innovation community on Food of the European Institute of Innovation and Technology (EIT), a body of the EU, under the Horizon 2020, the EU Framework Programme for Research and Innovation

| Deliverable | |
|---|---|
| Title: | Report Workshop industries Spain |
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| Authors: | Teresa Fresno<br>Sonia García<br>Mª José Hernando<br>Laura Jaime<br>Mª Victoria Moreno<br>María Pérez<br>Mariana Silva |

# Executive Summary

An online workshop with stakeholders from the (***) value chain was carried out in Spain following the established guidelines by the researchers team from AZTI, CSIC and UAM. Eight participants including representatives from primary producers, food processor and manufacturers, government bodies and consumer grops shared their perspective and advice towards enhancing consumer trust in the food chain.

A general agreement was reached when discussing about increasisng consumer trust, as transparency was pointed as the key to trust. Other aspects involving sustainability, innovation or communication with the customer were also mentioned as helpful to gain trust.

The discussion about future opportunities to increaese consumer trust again pointed at the need to give more and valuable information to consumers and the importance of unraveling consumer behaviour as key to improve products and processes.

- The workshop has been carried out without problems; participants were completly involved.
- All the participants are keen to collaborate in future steps of the project.
- Transparency is the key to trust.

# Summary of participants and timings of research/workshop.

An online discussion group with eight participants was organized on July 7 (2020). The Microsoft Teams platform was used to develop the workshop, thatwas recorded and safely stored.

The participants mainly come from companies and organisations involved in the food chain – primary producers, retailers, processors, food service, large companies involved in all stages; 3 or 4 others (e.g. from industry bodies, government, regulatory, and advisory bodies, food processors and manufacturers, primary producers, and consumer groups).

Timings:

1. DISCUSSION OF ORGANIZATIONS IN WHICH CONSUMERS TRUST AND DO NOT TRUST (25 Min)
2. DISCUSSION ON ISSUES OF TRUST IN GENERAL (20 Min)
3. DISCUSSION OF TRUST ISSUES OF CONFIDENCE FOR YOUR ORGANIZATION (20 Min) Padlet was used to promote participation and interaction between participants https://padlet.com/mperfer/w3czoztcb95krc4r
4. DISCUSSION OF WHAT ORGANIZATIONS ARE ALREADY DOING OR COULD DO TO IMPROVE CONFIDENCE (25 Min)
5. WRAP-UP (15 min)

# Industry view of issues that currently INCREASE consumer trust

- Leaning on a reference is complicated.
- Trust is driven by **transparency**, the consumer has more and more options, so each consumer generates trust by seeking information himself. Therefore, giving as much **information** as **possible in a comprehensible form** not open to interpretation about the processing, the product, the project… is fundamental.
- The most important things to generate consumer trust are: **clear labelling, transparency, coherence, consistency over time (in a large period), authenticity, quality, treatment, service, sustainability, convenience and ethic (social and environmental sustainability).**
- Now the problems for the consumers (social, environmental) are different than a few years ago (focused mainly on the food quality). Consumers are informed by short routes and they must be given **clear and quick information. Make a good job of teaching, telling the truth about the food product and its process.** The more information about the food product or the food process the better.
- **Provide information with reliable data to oppose the fake news**. Show data of the research projects that the companies are developing. **Data or numbers contrasted by other entities** (research centres, universities, consulting firms, specialists in the sector...) that are showing that what you put on the shelf or on your packaging is true. This is the best way to generate confidence. This could be an objective tool to reinforce your discourse as a company.
- The **technological advances and the technological investments in innovation** that the food companies are making **to increase both the quality of the food products and the knowledge of the consumers behaviour** have a positive effect over the consumers´ trust.
- The food companies´ **expertise**.
- **Direct contact with consumers.** The consumer feels that is the centre of the food company.
- There are several factors that can influence the opinion of consumers such as the **social media,** especially the positive comments or opinions from other people and the opinion of influencersor consumer organizations..., but currently there are no large groups that generate "blind" trust as happened a few years ago with some key food industries.
- **Food company´ value proposal**.
- **The food companies should give to consumers elements they can trust**, such as a quality product, a safe product, a healthy product, a tasty product.

- The **competition** among food companies. The one that gives more to the consumers (better relation quality/price, better tasty, brand guarantee, sustainability, ethical) will get the final consumer.
- **Quality labels**, although nowadays the consumers want more than a quality label, they want more information.
- **Sustainability investment**, but in a competitive way (linked to price).
- Initiatives to work increasingly with **compostable or recyclable packaging materials**.
- **Pursue the fraud**.
- **Give information instead of publicity**.
- Pushed by the Coronavirus crisis, **real communication** has been increased: real workers - not advertising models- in real time in a real factory.

# Industry view of issues that currently DECREASE consumer trust

- Consumer ideas are very fickle.
- Consumer trust can be lost very easily.
- **Social media**, especially negative comments or opinions from other people and the opinion of influencers on Instagram, Twitter and other platforms. These negative feedbacks are sometimes unfounded or given by people with not a specific expertise. Sometimes the radio or television spread this news to the rest of the people that are not connected to the net.
- There are several things that could have a negative effect over the consumers´ trust, however **it is necessary to know if the consumers would pay for it or not** (such as the "price" of sustainability or the convenience, related to ethical issues).
- Consumer **misinformation**.
- **Unsatisfied** consumers.
- **Misleading advertising campaigns**.
- The **commodities**, sometimes there are companies that are using **terms wrongly** (such as sustainability, km 0, innovation) that have a negative effect over the rest of the food companies that are doing a good job.
- Due to the Covid-19 crisis there is a new variable that must be taken into account, that is the **fear**. Fear of getting ill and fear for the economic situation.

# Industry initiatives to improve trust.

- **Increasing the quality of the product** through innovation projects, traceability, etc., to improve consumers´ trust.
- **Giving clear and transparent explanation of food composition and production** to consumers to increase the long-term consumer trust.
- **Giving consumers elements they can trust .These elements have to be clear, transparent, real and authentic**, such as a quality product, a safe product, a healthy product, a tasty product based on a good traceability system, good production control system, the improvement of the product, food tasty and healthiness, a competitive product… and show this information to consumers in a clear way.
- The **development of a good product** (process, quality, etc.) is fundamental. The food company is going to make that employees of its company become ambassadors within their social circle (family, friends, etc.).
- The **best ambassador** you can have is a satisfied customer or a person who is convinced of what the food company is offering.
- **Open-door policy**: conduct visits for consumers. It makes the consumer an ambassador for the company. If the consumer can see the factory and its actual employees, without advertising campaigns, their confidence in the product increases. To build trust through authenticity and truthfulness.
- **Continuous contact with consumers**.
- **Monitoring messages:** the administration must ensure that messages are truthful and pursue fraud also in this type of claims, environmental and sustainability, as well as health claims. Chase misleading advertising.
- **Communication with consumers in a clear and transparent way.**
- **Speak with the clients** (not only with the final consumers).
- **TV shows, such as "Food factory",** in order to increase consumer awareness about food production and therefore enhance their trust.
- **Direct work with producers**. Total control of traceability in both own farms and farmers´ farms, including aspects of social and environmental sustainability.
- **Development of research and innovation programmes** related to food and health issues.
- **Initiatives to work increasingly with compostable or recyclable packaging materials**.

# Gaps between consumer and industry views.

- **Traceability** (especially the food producers traceability).
- **How a company works.** How the food system works ("from farm to fork"). The consumers want to know where products come from, how they are made. This could be solved showing short videos about the way in which food company develops its products. These videos could be place on the company website.
- **To know the impact of COVID-19**.

# Opportunities for future initiatives that could improve consumer trust

- To give consumers real information.
- To generate confidence through reality, transparency, authenticity, truthful information.
- To show the consumers how the food products are made by real videos, interviews with real employees.
- To give the consumers the opportunity to know the food production by open doors journeys or in a virtual way, considering the industrial secrets and patents.
- To show more about the primary food production. The consumers nowadays do not know how the producers work in the field; it is a very unknown subject that could be improved.
- Better understanding of the food consumers behaviour could lead to a better chance to improve the food products and services.

# Industry workshop report (Italy)

This activity has received funding from EIT Food, the innovation community on Food of the European Institute of Innovation and Technology (EIT), a body of the EU, under the Horizon 2020, the EU Framework Programme for Research and Innovation

Nutrire Fiducia

Il cibo dopo la pandemia

EIT Food

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Program

**Introduction** Tiziana Andina, *University of Torino*

University

Maurizio Ferraris, *University of Torino*

Nicola Perullo, *University of Gastronomic Sciences*

Simona Stano, *University of Torino*

Erica Onnis, *University of Torino*

Press

Antonella De Santis, *Gambero Rosso*

Miriam Massone, *La Stampa*

*Chair*

Fausto Corvino, *University of Torino*

## Food and consumer trust

*Summary*

The stakeholders converge on the argument that those actions and activities that best promote consumer trust are those that increase transparency and foster consumers' involvement in a critical and constructive dialogue with the other actors of the food supply chain – either through direct contact or through web platforms. Conversely, they tend to agree that unethical behaviour is the biggest obstacle for building and defending trust, thus both critical shareholding and external pressure from consumers' associations and NGOs can contribute to discrediting companies. Our stakeholders agree with the main findings emerging from consumers. More specifically, they maintain that the demands advanced by consumers endorse the assumptions made by stakeholders about what promotes and what inhibits consumer trust

*Initial considerations*

The relationships between food and trust are essential to conceive a successful relationship between industry and the consumers. Consuming food requires trust in the entire chain of players active in the food industry, namely those people and those firms involved in several industrial sectors such as agriculture, food processing, marketing, and food distribution.

The often mentioned lack of trust in industry may be correlated, according to the participants, to a lack of trust in politics, and these phenomena might be the symptoms of a more general disaffection towards institutions which are perceived as far from people and everyday problems. For these reasons, the participants made the following considerations.

*1. How to build consumer trust*

1.1 The first consideration participants made is that if industries had **a general ethical attitude** and showed **ethical behaviours** (through philanthropic strategies, for instance), the consumers would be more inclined to trust it because he would perceive it as closer to himself and his world. A strong, **ethical public image**, moreover, would be even more effective than the offer of detailed information on the origin of each product, because while every consumer can develop trust in a virtuous industry, not every consumer has the abilities to understand and exploit the enormous amount of information industry provides about its products today.

1.2 Trust, however, is not just between food industry and the consumer. It must be built among the different sectors and players of industry as well. In other words, several needs should be taken in consideration: the needs of the capital, the needs of the workers, and, last but definitely not least, the needs of the planet. Workers, habitat, and the exploitation of raw materials produces an unethical industrial system that is unable to offer the right reasons to be trusted. **Transparency, responsibility and respect** in all the phases of food production are therefore essential.

1.3. Another important strategy that can increase consumer trust is the enhancement of **the emotional value of food**. Our relationship with food is not just cognitive, but also emotional. Food should not be just presented as non-toxic, harmless, and safe, but also as something able to make us feel better, something related to our cultural identity and to our way of life. Food can make our life more pleasant. It is not just a physiological need, but it is a fundamental part of our **culture**.

1.4. A **simple, direct and verifiable communication** about food production, distribution and quality is equally important because marketing can sometimes hide unethical actions and attitudes. In order to have a good communication about food, however, it is necessary to trust the media and to pay attention to the difference between serious, official and intellectually honest journalism and food blogging, which can be partial, inaccurate and biased. There is too much information and consumers are not always able to recognise the reliable one.

1.5. For the reason mentioned above, it would be useful to foster a more complete, comprehensive and **widespread education on food and nutrition.** The latter could provide the tools to orient consumers and to allow them to filter the information received from the media. In short, a more in-depth **food culture** is needed.

*2. How to inhibit consumer trust*

2.1. What emerged from the confrontation with stakeholders about what inhibits consumer trust is almost mirroring what promotes it. **A lack of transparency** and **a lack of direct contact** with consumers, makes the latter less willing to place trust in the actors involved in the process that brings food to their dinner tables. According to the 'small' stakeholders who took part in our workshop, meaning those representing small and local companies or retailers, the larger the company or he shop, the more difficult it becomes to establish a direct relationship of knowledge and trust with local consumer communities. Conversely, 'big' stakeholders, mainly the representative of multinational companies, have defended the importance of **the brand** universally recognized as the key element to win the loyalty of consumers, and have therefore given strategic importance to all those initiatives (from support to local stakeholders, to the fair treatment of those within the company, through investments to protect the environment) that define the image of the company over time.

2.2. In this regard, it has been mentioned several times and discussed the role of critical shareholding and non-governmental organizations as an effective leverage to erode trust in companies. Many examples have been made of companies in the food supply chain that have suffered considerable loss of reputation following attacks by associations and consumer groups on issues related to landgrabbing and the way companies appropriate and use raw materials.

*3. Where stakeholders and consumers converge*

3.1. The participants, be their farmers, retailers or food companies, agree with consumers that **farmers** are those actors of the food supply chain that experience **the higher degree of trust**. This is often associated to the perception, the majority of the participants maintain, that farmer do the hardest job, are paid less than the other agents, both relatively and in absolute terms – in a few words, they are exploited.

3.2. The participants agree with consumer about how **Covid-19** has been dealt with by food industry: everything possible has been done to ensure consumer safety in the face of an unprecedented health threat.

3.3. The participants believe that the eagerness of consumers to be more directly involved in the process of food production, through **constructive feedback**, as it occurs on platforms as TripAdvisor or Booking, for example, is in line with the stakeholders' view on consumer trust: it is mostly a matter of transparency, and the best way to keep companies transparent is to expose them to continuous external pressure.

*4. What can be done in the future*

4.1 The main and general idea embraced by the majority of participants is that it is in the interests of every actor of the food supply chain to invest time and resources in promoting food culture and awareness, so as to allow consumers to become always more active and effective in dialoguing with companies, punishing reproachable behaviours, remunerating good practices and offering direct indications about their own consumption needs - whether they are simple taste, safety or ethical requirements.

# Industry workshop report (Israel)

This activity has received funding from EIT Food, the innovation community on Food of the European Institute of Innovation and Technology (EIT), a body of the EU, under the Horizon 2020, the EU Framework Programme for Research and Innovation

## 1. Executive Summary

We conducted two workshops during July-August, one with 4 and one with 6 participants. The workshops were conducted in Hebrew, and participants were senior managers in Israel's food industry.

Main findings:

- Participants believe that consumers have the highest level of trust in farmers. They believe that consumers' trust is related to the actors' proximity to the components of the food, so the farther a food chain actor is from the food's components, the lower the trust is in this actor.
- Participants think that transparency is a significant factor that affects consumer trust in food.
- From a comparative point of view, participants talked more about issues that increase trust compared to issues that decrease trust.
- COVID-19 is perceived as an opportunity that could be leveraged in favor of increasing trust. It could be done by increasing transparency and improving the regulation process.

The OCVID-19 crisis colors our findings. Throughout the two workshops, participants often mentioned the COVID-19 and discussed cases and examples related to this issue.

## 2. Summary of participants and timings of workshops

Two online workshops were conducted via the ZOOM platform.

**Workshop 1** was conducted on July 20, with 6 participants, and its length was two hours.

**Participants:** Participants were senior managers of food companies, four women and two men. Their positions: vice president of regulation and corporate responsibility at a global manufacturing company, consumer service manager of a manufacturing company, CEO of an import company, CEO of a sector at a manufacturing company, brand manager In a manufacturing company, the director of health in a manufacturing company.

**Workshop 2** was conducted on August 12, with 4 participants, and its length was an hour and a half. One of the participants left the workshop early.

**Participants:** Participants were senior managers in food companies, two women and two men. Their positions: marketing manager at a large company, manager of innovation at an international food company, manager of innovation in an organization related to the regulator, senior manager at a regulatory office.

**Guideline:** According to the international protocol with some adjustments for the Israeli market. All groups were conducted in Hebrew.

**Analysis:** The workshops were recorded and transcribed. Transcripts were analyzed for each group and across the groups by themes, repetition, and comparisons.

3. Industry view of issues that currently INCREASE consumer trust (including the view of which types of organizations and sub-sectors within food are trusted).

Participants thought that consumers have the highest level of trust in farmers. They believe that the closer the actors are to untouched food components (such as vegetables), the higher the trust. Farmers receive the highest degree of trust since they are closer to the land, experience difficulty, and have a relatively low profit. Moreover, the fact that they had direct contact with consumers lately (COVID-19) has increased consumer trust in them. Also, they believe that manufacturing companies also enjoy high consumer trust because they are more transparent compared to other actors in the food chain.

Furthermore, participants thought that small companies receive higher consumer trust (compared to large companies), as they are perceived as more authentic, only trying to survive and not trying to make a profit at the expense of the consumer. On the other hand, large companies have an advantage as they can establish long term relationships with their customer and build a reputation that will contribute to consumer trust in them.

Issues that increase consumer trust:

- Transparency and communication with consumers - Participants noted that there are companies that communicate well with consumers, are transparent in their actions, and communicate the actions to consumers. They believe that these companies enjoy high levels of trust. Also, it was noted that companies that respond to consumer inquiries in the public space (social networks), which report faults before they are discovered by consumers and perform these actions transparently in the public space, are companies that will gain higher consumer trust. The issue of transparency was discussed repeatedly throughout the workshops.

- Positive customer experience - Most participants said that customer service and customer experience are vital components that affect consumer trust. An example of a brand that is highly trusted in light of its service system is "***", and specifically, the brand's online store. Participants noted that the online store allows a positive service experience and that the quality of service and the level of consumer trust can be seen by the way the company and its costumers communicate on the company’s Facebook page. One of the participants gave another example of a positive customer experience and revealed that his company makes the best efforts to give the fastest refund to its customers (up to 24 hours) and that they can see the consequences of this action in customer satisfaction measures.

- Keeping promises and stable prices - Several participants noted that keeping promises and stable prices are components that contribute to consumer trust. Participants used *** as an example of a company that takes a non-price-raising approach. Stating a promise and keeping it increases consumer trust, stating a promise related to products' prices and keeping it might increase consumer trust even more. They also noted that during the COVID-19 crisis, food companies did their best to meet the demand of consumers without raising prices.

- High quality and consistency - Participants noted that when consumers buy products, they expect always to receive the same product and at the same high-quality level. They used *** as an example. Consumers who purchase the drink expect to get the same product anywhere in the world. Even if the price is relatively high and the quantities of sugar are high, consumers are aware of the value - the product has high quality, has strict production processes and high consistency.

- Compliance with consumer requirements - Participants agreed that actions that contribute to compliance with consumer requirements promote and increase consumer trust. Also, they noted that collaborations with entities that lobby against the food companies for a variety of reasons might produce positive connections that will eventually increase consumer trust. An example is ***, which collaborates with bodies in the vegan community. In the past, these bodies lobbied against the company due to their use of food products taken from animals. However, the collaboration decreased the degree of antagonism and increased consumer trust among the vegan community. Another example is the actions taken to assist the gluten-free community, like labeling gluten-free products (products like milk). As a result of this action, trust in *** increased.

- Social Contribution and Sustainability - Some participants noted that when consumers receive information about a social contribution made by a brand, it creates a positive reputation for the brand and increases their trust in the brand. An example was the several actions made by the ***, such as encouraging its customers to collect *** bottles, the recycling park it has set up, and the summer volunteer trips. Another example is of companies that open sites in the periphery and employ locals. In addition, it was noted that throughout the Corona crisis, food companies had made great efforts to meet production requirements and that this will have future implications for consumer trust.

- Clear value proposition- Participants noted the importance of an agenda and of providing a unique value to consumers; for example, *** (a retailer) which used the slogan "the freedom to choose". Participants believe that this value proposition connects consumers to the brand and increases trust.

- Production country – Participants think that "Israeli" products and companies gain higher consumer trust.

- Action orientation - All participants agreed that active companies that are more initiative gain higher consumer trust. As every company has faults, the way companies deal with those faults is crucial. However, beyond dealing with faults properly, it is essential to take active action. For example, participants mentioned that *** has an app in which consumers can gain gifts after purchasing the brand's products. The app itself produces benefits for the consumer, winning gifts. *** uses the platform to collect information and contact their customers directly, even in the event of a product malfunction and recall. Consumers value the direct and immediate contact, which creates a higher level of trust between the consumers and the company. Also, it was noted that during the COVID-19 crisis, companies initiated actions to help those in need. Another example is the actions taken in light of the Food Labeling law in Israel. The food industry "embraced" the initiative, improved products, communicated with consumers, and publicly supported the law. These actions increase consumer trust in the food industry. Participants also said that improving products and their components is a trust-building step by itself.

- Communication - Some of the participants (but not others) thought that positive media coverage regarding the activities of the companies, such as news articles about social contribution, increase consumer trust.

- Innovation - Two participants argued that innovativeness is related to trust. They added that consumers are not fully aware of the importance of innovation; however, being an innovative company indicates that the company is trying to improve its capabilities and thus contributes to consumer trust.

4. Industry view of issues that currently DECREASE consumer trust (including the view of which types of organizations and sub-sectors within food are trusted).

Participants believe that the further the actor is from the food's components, the lower the trust in this actor. Consumers' trust in retailers is perceived as low because consumers feel that retailers are trying to entice them to buy unnecessary products.

In addition, they argued that consumers' trust in large companies might be lower than trust in small companies, as they are perceived as less authentic.

Issues that decrease consumer trust:

- Product harm crisis management - Participants have indicated that in the event of a product malfunction, poor management may harm consumer trust. They used ****** crisis as an example. It was suspected that the product might contain the salmonella bacterium; therefore, the company recalled its products. However, the conduct was not good enough, and therefore *** lost a significant share of its customers at that time. Consumer trust has been damaged.

- Lack of transparency - Participants noted that hiding information and lack of transparency undermine consumers' trust. After the trust is undermined, a great deal of effort is required to restore it.

- Poor quality - Several participants indicated that when consumers learn that the product quality is low or that it might affect their health, trust significantly decreases. The "***" crisis is perceived as a turning point in which consumers realized that even large companies might deceive consumers.

- **Sustainability as a marketing tool (greenwashing)** - One of the participants stated that social involvement and sustainability indeed contribute to consumer trust. However, companies should be careful of greenwashing and misuse of these actions.

- **Inconsistent products** - Participants noted that some actors have inconsistent products. For example, products that are sometimes sold in their original form, and sometimes are melted due to inappropriate conditions. Inconsistency in products' quality damages consumer trust in the product and the company behind it.

- **Decision made by the government and the regulator** - The regulation process is not uniform enough, and there is no public recognition for the great effort companies make to meet those standards. For example, a new regulation had been issued for olive oil. Therefore, the "made in Israel" product prices had increased and are higher than imported olive oil. Consumers think that local companies raise prices to make a profit at the expense of consumers, and thus their trust decrease. The government places full responsibility on manufacturers, which undermines consumer trust in them. The butter shortage crisis several months ago was given as another example. The target price was supposed to rise, but the government decided not to sign the agreement. The consumers were unaware that the dairy market is predesigned. For them, the manufacturers were the ones responsible for the butter shortage, which harms trust.

- **Class actions** - Participants noted that knowledge of class actions decreases consumers' trust. The ununiform enforcement of rules and regulations by the regulator sometimes lead to class action lawsuits that undermine consumer trust. For example, if two similar products of two companies include an inaccurate claim, the larger company will be suited for that claim using a class action, and the smaller one will not. Then, trust in the large company decreases, while trust in the small company who commits the same "offense" remains unharmed.

- **Politicians and the media** - Despite the ambivalence of participants toward the media, most of them indicated that the media is interested in presenting stories that produce "headlines", which are usually negative stories like class-action lawsuits. Additionally, they noted that politicians are also interested in creating a "buzz", to be perceived as heroes rescuing the public from food companies.

**From a comparative perspective, participants talked more about issues that increase trust than about issues that decrease trust.**

5. **Industry initiatives - what is currently/was set out to improve trust.**

Participants noted that their organizations do not have many initiatives whose primary purpose is to increase consumer trust. Notwithstanding, they noted that all of their actions contribute to consumer trust and that relevant issues discussed previously are included in their annual work plans.

**Actions that increase consumer trust:**

- A team of food manufacturers representatives was established to increase consumer trust; the initiative was not implemented due to the COVID-19 crisis.

- One company has an app that allows consumers to accumulate points in which they can use for repurchases of the company's products, the purpose of the app is not to increase trust. However, the company uses it to communicate with customers if necessary, an action that increases consumer trust.

- During the COVID-19 crisis, all food manufacturers collaborated to reach a large joint food donation.

- Due to the labeling reform, preliminary actions were performed, such as changing and improving the composition of products. These actions were communicated to consumers.

- Participants argued that a law that imposes a fee for filing class-action lawsuits - might reduce the number of lawsuits filed and, as a consequence, reduce harmful media exposure and help maintain consumer trust.

- Social involvement activities such as donations, volunteering, etc. increase consumers' trust.

6. Gaps between consumer and industry views

Participants' views in the focus groups and industry views in the workshops generally matched. Industry participants were not surprised by the findings of the focus groups.

7. Opportunities for future initiatives that could improve consumer trust (including leveraging existing industry initiatives more, possible new industry responses to consumer views)

- The COVID-19 as an Opportunity - Participants argued that companies could leverage the increased trust toward the local manufacturers through additional actions.

- Transparency - One participant noted that consumers seem not to doubt the quality of the products. Therefore, increasing the transparency in the supply chain, the selection processes of suppliers, and purchase prices could help increase consumer trust.

- Visitor Centers - Two participants said that visitor centers are a potential source for improving trust. One participant even suggested placing cameras in the production line; to provide consumers access to the production process.

- Social Involvement - Participants talked about continuing companies' social activities and their support of those in need. They noted that consumers appreciate such actions, and it contributes to building a trust-based relationship between consumers and the various actors in the food chain.

- Improving regulation among retailers - Participants described the retailers' pricing scheme as a "black box". Participants noted that complaints about product prices are directed at manufacturers rather than retailers, although more often than not, the retailers set the prices, and monitoring retailers by the government and the regulator will produce more transparency.

- **Trust in the government and the Ministry of Health** - One participant suggested to examine how the low level of trust in the Ministry of Health during the COVID-19 crisis affect consumers’ trust in the food industry.

- **Corporate transparency index** - Participants concluded that "everything starts and ends with transparency", in light of this, issuing a general index of corporate transparency may contribute significantly to consumer trust.

# Industry workshop report (UK)

This activity has received funding from EIT Food, the innovation community on Food of the European Institute of Innovation and Technology (EIT), a body of the EU, under the Horizon 2020, the EU Framework Programme for Research and Innovation

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| Authors: | Niloofar Borghei Razavi<br>Irene Garnelo-Gomez<br>Kevin Money |

# Executive Summary

Two online workshops with industry experts from the food industry were conducted in the UK by researchers from Henley Business School and the University of Reading. Nine participants (including representatives from large multinational organisations, industry advisors and food journalists) shared their views and experiences in relation to trust in the food industry, and considered what organisations and government bodies should do in order to increase consumers levels of trust.

Transparency was highlighted as key when aiming to increase trust, which aligns with the views shared by consumers during the focus groups carried out in June. Industry experts also discussed other factors, such as the importance of the relathionships with stakholders (including aspects of co-creation, responsibility and communication), the need for education (to increase awareness and knowledge), the need for consistency across the supply chain and the need to adapt approaches depending on the country/market.

When considering future opportunities to increaese consumer trust, industry experts emphasised on the importantce of stakeholder engagement (through transparency programmes), the need to develop purpose driven brands and the opportunity of engaging in initiatives such as reshoring, the development of a rating system and the applicability of blockchain (for assessment of members of the supply chain). Once again, participants mentioned the need for consistency across organisations and across the industry.

# Summary of participants and timings of research/workshop

Two online workshops were organised to take place on 9th and 16th of July. The sessions were hosted by and recorded using Microsoft Teams.

In total, 9 participants shared their views and experiences in the sessions, 5 of them being employees of companies involved in the food supply chain (**food processors and manufacturers**), 3 of them being consultants (**industry advisors**) and 1 of them being a food journalist and a policy advisor for a wholesale/retail market (**media/policy making**). The name of the companies the first 5 participants mentioned above work for are not shared upon participants' request, but please note that all 5 companies are large multinational organisations working in the food and beverage industry. The 5 participants hold positions ranging from CCO to R&D Director, Director of Strategy and VP of Communications. It is worth noting that all participants are interested in the project and would like to engage again in the future.

Timings:

6. Introduction of moderator, workshop and participants (15 Min).
7. Discussion of organisations consumers trust and do not trust (30 Min).
8. Discussion of trust issues in general (20 Min).
9. Discussion of specific trust issues/trust initiatives in their own organisations (15 Min).
10. Sharing of findings from consumer focus groups, reflection on those findings (15 Min).
11. Discussion of what could be done (or it is being done) in order to build trust (apart from initiatives mentioned in point 4) (15 Min).
12. Wrap-up (10 min).

# Industry view of issues that currently INCREASE consumer trust (including industry view of which types of organisations and sub-sectors within food industry are trusted)

- **Transparency** of food organisations.
- **Adjusting the approach** according to the market's characteristics.
- Shared **values** and shared **responsibility** with stakeholders.
- **Consistency** across an interconnected supply chain.
- **Approach** to large-scale **scandals/crises.**
- **Educating** consumers in order to bridge the attitude-behaviour gap.

## Transparency of food organisations

Participants highlighted that transparency requires openness and honesty and the willingness to engage in difficult conversations with stakeholders. In the first workshop, participants argued that organisations should take the hard way, and yet **deliver what they promise** they will do to become more transparent, and even if they do not fulfil their milestone, they should be able to show their stakeholders that they are moving in the right direction. In other words, to build consumer trust, organisations should do what they say they will do. However, participants of the second workshop were more wary of such radical disclosures as they argued that as soon as an organisation discloses an issue, it face the "what were you doing before" question and that can have a boomerang effect on consumer trust, or more broadly on stakeholder trust. In the first workshop, one expert talked about the unique nature of the food and drinks business as the end product of this industry is something that consumers literally put into their bodies on a daily basis. Therefore, this industry is unlike any other industry and there is a certain level of **accountability and responsibility** that goes with that. Building on this, one other expert in the first workshop highlighted that transparency and ethics are intertwined. That is, organisations are willing to be transparent when they have nothing to hide from consumers.

## Adjusting the approach according to the market's characteristics

In the first workshop, one participant argued that what organisations, especially the multinationals, need to do in different market varies according to the **characteristics of that target market**. For example, while in some developing countries, the main concern is still the baseline of safety, quality, and health, in developed and Western Europe countries consumers are holding organisations accountable for sustainability, fair trade, and environmental issues. Therefore, there may not be a global solution that fits all markets.

## Shared responsibility with stakeholders

Participants regarded transparency as the way to also allow **consumers to take responsibility** as it enables them to make more informed choices. In other words, participants argued that trust is co-created through shared responsibility, with organisations acting as **enablers**.

## Shared values with stakeholders

In the first workshop, participants argued that transparency allows consumers to determine what are the values of the organisation and whether they, as consumers, have any shared values with that particular organisation. In line with this, in the first workshop, it was highlighted that consumers need to see that they are represented by a certain organisation and this representation will allow consumers to see themselves as a part of the organisation's story and therefore, have higher levels of **identification with that organisation**. In the second workshop participants highlighted the importance of differentiating between organisational values and brand values as values of a brand may not be the same as values of an organisation. They mentioned *** success in keeping *** brand values at an arm-length, even though *** belongs to *** after all.

## Consistency across an interconnected supply chain

Experts in the first workshop highlighted the crucial role of organisations in moving towards **more cohesiveness and more coherent stories**. Participants argued that by this means organisations can reconcile the paradoxical interrelatedness and fragmentation of the global food supply chain, which in itself has the potential to wreak havoc consumer trust. In the second workshop, this was discussed in the context of **need for consistency**, both across the company and across the food industry as participants argued that when everyone is saying the same thing, it is easier to get the message across (and, therefore, increase levels of trust).

## Approach to large-scale scandals/crises

In the second workshop, participants highlighted that most issues have short-term impact as people usually have a short-term memory and they tend to be forgetful. However, certain scandals and issues tend to have a longer-term impact and stay in consumers' memory for a long time. By this argument, participants highlighted the importance of **identifying which issues** are going to be in the second category and need to be **addressed in a more serious manner**.

## Educating consumers in order to bridge the attitude-behaviour gap

In the second workshop, participants elaborated upon the challenge of changing both consumer attitudes and behaviours towards food. In this regard, one expert argued that in the UK, **educating consumers** that fruits and vegetables are good for them has been a real challenge and we are now at this point that consumers know that fruits and vegetables are good for them, however, they still do not eat enough of them. The same applies to **consumer's understanding** of 'best before' and 'use by' labels. Additionally, one other expert in this workshop mentioned that the lesson that they had learnt the hard way as an organisation was that consumers appreciated innovative ideas and positive change in theory, however, they were not willing to pay higher for an existing product that had been improved to be more sustainable with more environment friendly packaging. Those consumers with more knowledge about the food industry could perhaps understand the sector and its complexities better and therefore, levels of trust could be higher.

## Industry view of which types of organisations and sub-sectors within food industry are trusted

There was no agreement between participants from both workshops in relation to what type of organisations are more trusted (large vs small). However, they all agreed that consumers trust familiar brands and also trust the government (UK government).

## Trust in large organisations

In the first workshop, large organisations and well-known brands, as well as retailers' brands were identified to be **more trusted** by consumers. Industry experts in the first workshop argued that large organisations can do a better job in assuring quality, safety and consistency, enjoy higher brand reputation, longevity as well as stronger track record and corporate governance. Further, the existence of large food organisations for a longer period of time, gives them longevity and allows them to build a heritage. It was also argued that the track record and longevity of large organisations makes primary food producers less trusted as food safety and quality is often associated with large organisations. Simultaneously, participants of the first workshop acknowledged that **big brands and big companies are trusted until they are not**, and once consumers lose trust, it would be really hard to regain their trust.

## Trust in smaller food organisations

In the second workshop, however, industry experts suggested that **smaller companies and food producers are more trusted** by consumers because of their familiarity and locality. Participants in the second workshop argued that consumers associate big food organisations with complexity and wrongdoing and when scandals arise, they are more forgiving of smaller companies compared to large organisations as they have higher expectations from large organisations. Nevertheless, it was also argued that a company like (***) is trusted because it does not come across as a large food organisation, even though it is owned by (***). Further to this, experts in this groups suggested that **consumers are quick to forgive small companies**, however, they are more likely to hold a grudge against large organisations, partly because of their perception about large organisations and partly because of their higher expectations, and thus higher level of disappointment and frustration with large organisations.

In addition to this, participants in both workshops highlighted that consumers trust and buy **familiar brands** and they expect familiar brands to continue to consistently taste the same and maintain their quality. Especially when it comes to brands that have been around for a long time.

## Trust in governmental and food regulation bodies

Participants of both workshops argued that **consumers generally trust the government in the UK**. They argued that consumers believe that the regulations are on the right track to assure food safety and quality. Participants argued that visible regulation builds trust and it is important that products are **regulated**. One expert in the first workshop argued that the UK needs a regulatory body like the Food and Drinks Association (**FDA**), and that the existence of such organisation could have a major positive impact on consumers' level of trust. In addition to this, another expert in the first workshop argued that making such judgement about consumers' trust in the government can be quite challenging as food companies often operate in multiple markets and, in certain markets, governments are corrupt and dysfunctional and people do not trust their role in regulating the food industry. Therefore, the answer to the question of "do consumers trust governments?" depends on which country and government one is talking about. In addition to this, it was argued that governments and regulatory bodies cannot be seen as the guarantors of quality and standard and that the COVID-19 crisis has been an informing example that illustrated that **governments cannot guarantee the health and safety of individuals**. As a result of this, and because of the freedom that most organisations have, it is up to organisations to set their standards and set them as high as possible. Further to this, it was argued that some of the food safety issues can be caused by Brexit. Participants argued that Brexit can complicate standards and yet maintaining the top standard is important.

Therefore, it is crucial for organisations to set the bar high in terms of the government and setting the bar higher when it comes to the business.

# Industry view of issues that currently DECREASE consumer trust

- Lack of **transparency** in food organisations.
- Consumers' (**lack of**) **awareness and knowledge**.
- **Inconsistency** across an interconnected supply chain.
- (**Wrong**) approach to **managing scandals/crisis**.
- Industry's approach to discuss **sensitive topics with stakeholders.**

## Transparency of food organisations

Transparency of food organisations was highlighted as one of the major issues that can either build or diminish consumer trust. Transparency was not only discussed in the context of scandals when they arise, but rather, in terms of the proactive approach of organisations in being upfront and honest with consumers. If they **fail to be as transparent as they could**, levels of trust could decrease.

## Consumers' level of awareness and knowledge

Experts in the second workshop argued that in the context of trust, majority of issues in the food supply chain arise because of consumers' **lack of awareness, knowledge and understanding of what food and the food supply chain is about**. In this regard, one expert argued that consumers do not know what they do not know, and yet, they assume that they understand their food because almost everybody does at least some type of cooking at home and yet, sometimes they lack the basic knowledge about matters such as when and why certain food goes bad. As a result of this, when they face a certain issue, they consider the food organisations and retailers the culprit and not their lack of awareness. One expert in the second group gave the example that consumers read the cooking instructions only the first time they buy a product and the following times, they assume that they know how to cook a certain product and when problems arise because they have not followed the instructions provided on the package, they accuse the food company because of the problem and do not hold themselves accountable.

## Inconsistency across an interconnected supply chain

Experts in the first workshop talked about the interconnectedness of the global food supply chain and food ecosystem, pinpointing the **lack of cohesiveness** and **consistency** in this interdependent ecosystem, which at times leads to a decrease in the levels of trust.

## Approach to large-scale scandals/crises

Large-scale scandals/crises undoubtedly **decrease levels of trust**. As mentioned in the previous section, if crises are managed in a serious (and perhaps genuine) manner, levels of trust could be increased. However, the opposite could happen if crises are not managed appropriately.

## Industry's approach to discuss sensitive topics with stakeholders

As previously mentioned, participants of the second workshop also highlighted the challenge of communicating certain issues to consumers without risking further accusation and blame from consumers. This was also discussed in the first workshop as one expert reflected on her own experience of avoiding certain food organisations after the Horse Meat Scandal. In addition to this, this expert also added that certain issues like country of origin could have the same impact arguing that when a crisis like COVID-19 happens, consumer may avoid or be wary of food from certain regions for a long period of time. In line with this, in the second workshop experts mentioned that **consumers have a set of non-negotiables**, such as animal welfare in the food industry and problems that are related to their non-negotiables can have a negative impact on their level of trust. One expert in the second workshop highlighted the role of the media in focusing on and spreading negative news rather than covering what it done right and what has changed for the better in the food industry. Therefore, if organisations follow the wrong approach when discussing sensitive topics, levels of trust might decrease.

# Industry initiatives what are currently set out to improve trust

- Formal and genuine **transparency programmes.**
- Knowledge of societal **norms/trends.**
- Giving back to the **local community.**
- **Rating** the supply chain's ethical approach.

## Formal and genuine transparency programmes

In the first workshop, in line with the discussion about the crucial role of transparency, one of the participants suggested that formal and genuine transparency programmes always work. This expert highlighted that organisations are ought to **identify where their risks are, who is affected by them, and then find solutions to mitigate those risks**. It was also argued that transparency applies to all multi-nationals. It is a template that all businesses can use and therefore, when there is a critical risk, that concerns a large number of consumers or stakeholders, the only defence is going proactive and being transparent about it. By this means, organisations set an example for others in the industry and potentially change industry practices forever. Participants drew upon examples from other industries (e.g.

***'s tax transparency initiative and human rights issues disclosure in fast fashion) to make their point about the importance of transparency programmes. Participants argued that there is **power in sharing and in showing vulnerability and willingness to do the right thing** to stakeholders. Participants argued that such programmes are about doing the right thing at any costs and an important part of that is about quantifying the programme to show the progress made in the right direction, even if a target is not hit a 100 percent by the end of promised period. In line with this, one of the experts in the first group argued that transparency programmes alone are not enough, and organisations should also strive for **stakeholder engagement**. In addition to being transparent with stakeholders, organisations need to engage with stakeholders and allow them to be part of the change journey that the company is undertaking.

## Knowledge of societal norms/trends – standing for what is important to stakeholders and society as a whole

Participants of the first workshop argued that having something to stand for is as important as transparency programmes. For this purpose, organisations need to constantly compare societal norms with their organisation's strategy to determine whether they are going in the same direction. In such initiatives, there is a level of **listening and co-creation** with consumers and other stakeholders. Further, when an organisation set certain expectations, it needs to be able to deliver. **When the organisation delivers, trust is created**. For this purpose, having a detailed roadmap is crucial. Participants drew upon movements such as Black Lives Matter and argued that when a company admits that it needs to do more, it needs to be clear about what it is going to do and how it is going to do it. Further, they argued that when an organisation says that it is going zero on carbon, it needs to be specific about how that goal is going to be achieved. Setting a positive end goal will not gain an organisation trust in and by itself; **the how** is also quite important. Therefore, it is important for organisations to know which issues they are looking at, which societal movements they are going to join and what they are going to do about them.

## Giving back to the local community

In the first workshops, experts also elaborated upon the importance of giving back to local communities by **creating partnerships and making a difference** in the community. Experts argued that such initiatives have so far been really powerful in terms of building trust with local communities as they help people understand more about an organisation's business. Consumers are likely to trust an organisation more when the organisation is employing people from a local community and is also producing something that is of benefit for the wider community.

## Rating the supply chain's ethical approach

In the second workshop, one of the participants stated that from his experience in the food industry, he perceives that, similar to hygiene ratings for restaurants, a rating system for **ethicality of manufacturers and food producers** is missing from the supply chain.

# Gaps between consumer and industry views

- Key themes considered by both stakeholder groups:
  - **Transparency.**
  - Giving consumers **responsibility** (co-creation).
  - Need for higher levels of **information/knowledge**.
  - Need for a **rating** system.
- Topics mentioned by consumers (and that should be considered by industry):
  - Need for a more **local** supply chain/more local products.
  - The **positive impact COVID-19** has had on consumers' levels of trust.
- Topics mentioned by industry experts:
  - **Relationships with stakeholders**.
  - **Inconsistencies** across the supply chain
  - The **approach** followed in different markets.

Following the discussion around the current state of consumer trust in the food supply chain as well as industry initiatives, key themes coming from the focus groups conducted with consumers were shared. Moderators explained to the participants that **transparency** was repeatedly highlighted by consumers as an important factor in building trust. They were also informed about how important a **more local supply chain and more local products** are for consumers, and how **COVID-10** has made a **positive impact** on consumers' perception of food supply chain's trustworthiness. Furthermore, workshop participants were informed that consumers have also highlighted **the need for a rating system**, similar to TripAdvisor, that allows them to rate retailers, producers as well as their products. Workshop participants were also informed about consumers' need for **empowerment, control, and involvement**, in the sense that they hoped to be the ones rating retailers rather than having an official body that delivers the rating to them. Workshop participants were also informed about consumers' confusion and **need for clarity and information in regard to the terminology** used in the food industry (e.g. organic, free range). Further to this, consumers' acknowledgment of the ambiguity of the manufacturing process was also discussed.

Considering the conversations carried out with both consumers (during the focus groups) and industry experts (summarised in Sections 3, 4 and 5), it could be argued that in general terms their views are aligned. Both stakeholder groups highlighted the importance of transparency, giving consumers responsibility (co-creation), need for higher levels of information/knowledge and need for a rating system. Topics that consumers mentioned but industry experts did not consider include the need for a more local supply chain/more local products (although industry experts discussed the idea of giving back to the local community) and the positive impact COVID-19 has had on consumers' levels of trust. Topics that only industry experts considered are mainly related to relationships with stakeholders (in terms of shared values and how organisations communicate with them), inconsistencies across the supply chain and the approach followed in different markets.

The themes that were shared from the focus group findings with workshop participants gave rise to three main questions:

1) How **transparency** be made more consumable as far as the food supply chain is concerned?

2) How can the balance between **local actors and global actors** be reached?

3) How can we make the **positive impact of COVID-19** on consumer perception long-lasting?

Participants were asked to reflect upon these questions coming from themes mentioned above and share with the rest of the group any opportunities for future consumer trust initiatives that came to mind based on these findings (Section 7).

# Opportunities for future initiatives that could improve consumer trust

- **Stakeholder engagement** through transparency programmes, leading to reputation and trust.
- Development of **purpose driven brands.**
- **Consistency**, across the organisation and across the food industry.
- Reconciling the local/global actor narrative would depend on the country/market, but organisations should consider what **they could do for the local community.**
- **Reshoring** (shortening supply chain, giving it a local feel). Need to consider tensions between price and origin, in particular in times of financial difficulty.
- **Rating system** (by an independent body) and **blockchain.**

## How can transparency be made more consumable?

In the first workshop, in response to the first question posed by the workshop leader (i.e. how can transparency be made more consumable?), participants highlighted the importance of **stakeholder engagement** and acknowledged it as the means to build reputation and thereafter, trust. That is, when stakeholders are involved in, instead of being solely informed about, the development of transparency programmes (building reputation and trust) becomes easier for an organisation. Further to this, participants highlighted that organisations need to be very factual about what a brand stands for and what a brand stands for needs to be an issue that matters to society and its people. Additionally, organisations need to build more **purpose driven brands**, which are evidence-based, fact-based, and honest about the product. Therefore, what brands stand for, how they express themselves and the platform they use to get their message across to consumers play an important role in making transparency more consumable. In the first workshop, participants also highlighted that organisations need to actually do what they say, and they need to be consistent in their approach.

With regard to future initiatives aimed at ameliorating transparency, in the second workshop experts highlighted that **consistency** across the company as well as consistency across the food industry are of high importance. Participants acknowledged that such consistency would help get the message across with more clarity. For this purpose, it is important that organisations commit themselves to this. In addition to this, participants mentioned that certain TV programmes like 'Inside the Factory' give consumers the opportunity to see the manufacturing process.

## How to reconcile the local/global actor narrative?

In response to the question of how we can reconcile the local actor/global actor narrative, in the first workshop, one of the participants mentioned that the going completely local **in some countries will not work**. For example, while the emphasis on the Swiss origin of products in Switzerland would create a positive impact, such emphasis in Nigeria could potentially backfire and in a country like Nigeria the global nature a certain product could actually demonstrate and assure consumers of consistent quality. Moreover, relying on the local industry in certain regions can be problematic as their products is likely to be unregulated and unsafe, even though they have the highest local consumption rate. This expert mentioned that what organisations can do in such markets in **considering what they can do for the local community**. In the first workshop, one expert answered this question in relation to COVID-19 pandemic and stated that the recent crisis has made people more aware of local brands and businesses. However, the **tension between cheaper food and supporting local producers** and paying higher continues to exist, especially in times of financial difficulty. Acknowledging the hardship of going local in certain markets, experts in the first workshop highlighted that with the industry's rush to prove locality and giving back to community, the trend in **reshoring**, in shortening the supply chain, in providing a local feel and look to consumers is undeniable.

## How to make the positive impact of COVID-19 linger?

In the second workshop, participants talked about consumers' return to more traditional (home) cooking as a result of COVID-19. One of the participants mentioned that there is less food-on-the-go and more homemade food consumption and online shopping with retailers. While these may turn out to be a long-term impact of COVID-19, consumers long to be able to go to restaurants safely.

## How to rate suppliers and manufacturers based on ethics?

Moreover, apart from answering the three questions asked by the moderator, participants of the second workshop argued that **consumers lack the needed knowledge and information** to be able to rank a retailer or a brand in terms of its ethicality and the most suitable alternative would be an **independent body**. One expert also mentioned the potential applicability of **blockchain** for assessing suppliers and how they source their ingredients.

# Industry interviews report

This activity has received funding from EIT Food, the innovation community on Food of the European Institute of Innovation and Technology (EIT), a body of the EU, under the Horizon 2020, the EU Framework Programme for Research and Innovation

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# Executive Summary

In order to address the global environmental and health challenges, it is, amongst other things, crucial for consumers to trust their food system and its actors. As food supply chains become increasingly longer and food systems become more complex, lack of transparency, traceability and authenticity along the food value chain are cited as the biggest challenges for consumer trust. Consumers feel forced to rely on the information they receive either directly from the food industry (e.g., food packaging, advertising), or indirectly from the media and national governments, about where the food comes from, what it contains and how it was produced.

As part of the Grand Challenge "title" (project ID), we have set out to explore the views of several key stakeholders along the food value chain regarding the role of consumer trust, trust engendering activities they have already undertaken and those they plan to undertake in the future.  Together with project partners from the University of Reading, Queens University Belfast, University of Turin, University of Helsinki, Autonomous University of Madrid, University of Warsaw, and Technion, we conducted three to five interviews each in Finland, Israel, Italy, Poland, Spain, and UK. Interview partners range from industry associations to national food authorities and key national media.

## Top level findings

How the food system is perceived by its citizens and the various stakeholders involved along the food value chain differs largely by **country**. Italian consumers seem to have a unique relationship with food and place a lot of importance on local or at least national products that have been produced traditionally and hence suggest a certain level of quality. Poland prides itself on being a big exporter of food and therefore concluding that, especially abroad, the Polish food system has a good reputation. The UK is heavily influenced by their recent exit from the EU which creates an uncertain future when it comes to provenance and standards of imported food. Finland believes to have very good collaboration among stakeholders along the food value chain and their national authority is well trusted by consumers for fact-based information, even though social media does pose a new challenge through fake news. Israel is proud of a strong and independent food industry that survived COVID-19 without outside help. Spain also has the impression that the pandemic actually had a positive impact on the food sector but that this will soon be forgotten and media will take over the discourse again.

The **trust-engendering activities** undertaken by these stakeholder groups include implementing food controls and hygiene measures to ensure food safety, opening up the dialogue around consumer trust with actors of the food chain but also directly with consumers, and for companies to donate to charities and showcase how they contribute to the local economy. The food industry displays a clear goal to become more transparent by opening up one's doors, either physically or through information shared via websites and applications. The two biggest themes emerging from the interviews are collaboration, although not all countries felt that national authorities were involved, and informing consumers, through labelling and/or educational activities.

One of the **main barriers** to engendering more consumer trust appears to be the financial aspect. Tackling such an all-encompassing issue in such a complex industry requires cooperation and various activities that require investment. Another barrier that was mentioned is the (lack of) collaboration with and within public administrations that would be necessary to guide consumers and the industry from a united front.

**Recommendations** for how to improve consumer trust include more transparency from the industry and a more honest discourse about what still requires improvement. Emphasis is also placed on the need for more information provided to the consumer, combined with education that may start as early as primary school. Lastly, a common theme across stakeholder interviewees is the need to cooperate, within and between different stakeholder groups, due to the global nature of the food system and the multifactorial influences on consumer trust.

Many of the interviewees believe that **COVID-19** will not have major long-term effects on consumer trust in food and predict things will eventually get 'back to normal'. However, it is acknowledged that this pandemic may have made consumers more aware of the importance of the food supply chain and how fragile it is. They may in the future lean more towards local products just as countries may lean towards attempting to be more self-sufficient to brace for the future.

Across stakeholder groups, there is a common wish to focus more on science-based information and for consumers to learn how to steer away from fake news. Although consumer trust is of increasing importance to all stakeholders, how to engender it and how keep it appears to be a struggle, due to its multi-factorial nature which makes trust difficult to influence, requiring substantial financial input and last but not least the willingness of all actors to achieve it.

# Method

Our project goal was to get insights on what the food industry, media and national food authorities of Finland, Israel, Italy, Poland, Spain and UK think about consumer trust and if/how they engender trust. Through our own research and through contacts of our project partners from the University of Helsinki, Technion, University of Turin, University of Warsaw, Autonomous University of Madrid, University of Reading and Queens University Belfast, we collated several potential key informants per country and stakeholder group and created an overview with Excel.

In early June, our partners from the above-named institutions started to get in touch with some of the contacts based on who would be best suited. We provided our partners with an invitation email (page 26) which laid out the goal of our project, type of interview we were inviting them to participate in and some possible dates to choose from. Our partners could translate into the local language and adapt this text as they saw fit.

We also provided our partners with a consent form (page 27) as well as a simplified outline of the questionnaire (page 28) to share with the contacts who responded positively to our invitation. If contacts declined or did not answer, our partners contacted the remaining contacts from the Excel sheet in order to reach at least one interview per stakeholder and country.

In total, 25 interviews were held by our partners. An overview can be found in Table 1 below.

We collated the answers of all interviewees into one Excel document and started going through the answers and wrote summaries of the main findings per question, for each stakeholder group of each country.

Please note that this is qualitative data and should not be interpreted as quantitative in terms of percentages or frequencies. Rather, we were interested in understanding how stakeholders deal with the topic of consumer trust and how this may vary between country and stakeholder group.

| Country | Finland | Israel | Italy | Poland | Spain | UK | |
|---|---|---|---|---|---|---|---|
| **Project partner** | University of Helsinki | Technion | University of Turin | University of Warsaw | Autonomous University of Madrid | University of Reading | Queens University Belfast |
| **Industry** | Food industry organisation | Food manufacturer | Confederation<br>Confederation<br>Federation | Federation<br>Entrepreneur and Mentor | (***) industry organisation | Food manufacturer | Union/Representation |
| **Media** | Journalist | Media company | Journalism Festival | Journalist | Food magazine | Food magazine | |
| **National Authority** | Government administration | Regulatory association | Consulting NGO to the (***) | Government ministry | Government agency | Government department (3)<br>Semi-governmental body | |

Table 1: Overview interview partners and respondents per country

# Results

## Consumer trust

As a first step, we wanted to find out our interviewees' general views on consumer trust in food actors and the food supply chain: what it means, why it is important, and what the main issues are.

## Relevance of consumer trust in food

Firstly, participants were asked why they think consumer trust in food is important in order to find out what, in their perspective, are the consequences of lack of consumer trust in food in general, and lack of trust in the food supply chain in particular. The following section describes the answers by country and stakeholder group.

### Finland

The respondent from the **industry** believes that consumers are the growth engine of the whole food system. Consumers demand healthy, sustainable, personalised and high value, but reasonably priced food and services. Food industry builds consumer trust with high quality and innovative products and supply chain and does that every day to compete sustainably in the international markets.

The respondent from the **media** believes that food safety is so important because food (including beverages) is essential for all of us. The best possible taste, freshness or price etc. comes far behind there in his view.

The respondent from a **government administration** believes that food is important because everybody eats. Food is related to our basic needs, nutrition, health, culture etc and as such should be considered safe.

### Israel

The respondent from the **industry** believes that food companies work for the consumers and that they need to satisfy consumers desires, which is getting the product they want. The aspects that affect consumer trust also affect their desire for the product. Consumer trust is the most important issue.

The respondent from the **media** believes that trust is of high significance. Once a year, they publish a booklet called a trust report. This report deals mostly with journalism but has an impact on many industries, including food. Today, because of social networks and other things, the consumer requires transparency including on food components, environmental impact, and working conditions. Companies are being scrutinized and anything not transparent may lead to shaming and damage the brand.

Media and the food industry have (rightfully) suffered from this. The food industry was using tasty ingredients and did not look at how healthy they are (e.g. trans fats). The media has suffered from consumers who stopped buying newspapers because they do not trust nor believe them due to hidden marketing content and lack of diversity.

The respondent from a **regulatory association** believes that the trust between manufacturers and consumers is basic in every industry, as without it, consumers will would not buy the product. In the food industry, the importance of trust is intensified, as it is consumed daily and there is no way to avoid it or fix any faults it may have. It is also accompanied by a great deal of emotion as it symbolizes family and nostalgia. Compared to other industries, in the food industry, trust issues are more sensitive, consumers must believe that the product is safe, have a high quality, and that they will receive what they expect (ingredients, flavour and etc.)

## Italy

The respondents from the **industry** believe that low consumer confidence roots from three things: 1) From past errors that food actors have made (e.g.: low respect of rules and procedural guidelines), including crises like with dioxin. The respondents emphasize the need to not repeat these errors. 2) From the difficulty of conveying realistic messages that do not get wrongly interpreted. For example, the message “Made in Italy” is wrongly assumed to guarantee quality and safety, even though this statement does not per se guarantee this. 3) From the media spreading incorrect messages such as that food could carry COVID-19 and requiring importers non-existent “virus free” certifications.

The respondent from the **media** believes that food has become an element of identity that can bring us together during this era of uncertainty, loneliness, and anxiety. Food used to be about curiosity and taste. Today, there is a very strong focus on ethical and presumed health choices, and consumers want to know everything about the food, even what is not required by law to be disclosed. Scientific evidence is no longer the most important factor.

The respondent from a **consulting NGO to (***)** started off by defining what a consumer is. To the respondent, this is not only the person who goes food shopping, but the person who relies on food banks to receive donated food. We all are consumers, but there are the ones with purchasing power and the ones without. The theme of trust is inherent in all consumers whether with purchasing power or not because food must be safe in order not to cause health problems and it must be tasty to give me satisfaction in the act of eating.

## Poland

The **industry** respondents believe that Polish consumers nowadays are more aware than they used to be about food safety issues, including wet markets and COVID-19, as well as food fraud.  The respondents do not necessarily see this increased awareness as negatively, because it consumers are paying more attention to labels and put more thought into the food they shop generally. The downsides are that some consumers may falsely assume that, if the mainstream food system is not trustworthy, that buying outside of it inherently is, which may lead to worse choices. Choosing bazaars over stores, which may be much more unsafe and untransparent. Another downside is that food and shopping is no longer associated with only positive emotions like pleasure from eating but also with stress and worries about their health.

A **journalist** believes that consumer trust in food is essential. Trust is important, and it is not too low in Poland at the moment because consumer awareness is growing. However, as various studies show, the price of the product is still the most important factor influencing consumer purchasing decisions.

A **national authority** believes that consumer confidence in food is very important. They must trust producers because EU regulations impose on producers the obligation to ensure food safety. Through our actions, consumer confidence in food safety is built. If the quality decreases, the producer loses customers and profits. The respondent noted that consumer awareness regarding knowledge and expectation of delivering the knowledge from food supply chain actors is growing. An important issue to consumers is food quality and the use of additives. Consumers believe that food additives are bad, which the respondent believes to be a misconception because they are used in the right amount, subject to control. Networks trying to attract the customer by meeting their expectations try to use fewer additives, even if fewer additives make the food "poisonous".

# Spain

A representative of an **industry** forum believes that consumer confidence is a perception that consumers have based on what they perceive mainly through the media. Most consumers do not know exactly the production methods that the European Union has established, so trust is still a perception that in some cases will be wrong and in other cases correct. It is important because it is the image of the sector itself. If the consumer trusts what they see on the shelves or in the restaurants, it means that the image of the entire sector and its operators is positive. If there is no confidence, the image of these operators is seen as negative.

A **newspaper** believes that consumer trust is the conviction that the products they purchase and consume are safe and that the information offered to them is trustable. Consumer trust is key, since if consumers do not trust a particular brand, they will not buy it. Even if there is a problem with a specific brand it can affect other brands that sell products in the same category even if they do not have the problem. According to the Eurobarometer, consumers can even change their consumption pattern if they see any risk, so trust is key.

A **national authority** respondent believes that consumer trust is a value to pursue. They understand it as an evaluation of their work as an agency and of the system that is currently implemented in the EU and in Spain. If the consumer is able to have confidence in the agri-food chain, this translates into confidence in the system. If the consumer does not have confidence in the system this can have a negative impact on their choices, leading them to make less healthy and less sustainable choices. If they do not trust the labelling or the message from the authorities, this can have an impact on our health and on the planet. Ultimately, the fact that the consumer does not trust the system itself can lead to its dismantling, as the consumer may consider that there is no need for an agency like ours or that there are no sanitary inspections.

# UK

The **industry** respondents believe that consumer trust is important because they are their customers and one scandal can affect trust in the entire brand. Through social media and globalisation, consumers are becoming more much aware about their dietary and health needs as well as environmental impacts. They have more information but also more misinformation at their fingertips. The respondents believe that they have to have integrity and take on the responsibilities of environmental impact and animal welfare, be transparent and also to communicate effectively.

The **media** respondent believes that consumer trust means that the food they buy is safe to eat and won't make them ill, as well as that it sustainably sourced.

With regard to safety, consumers trust that the food they buy from supermarkets is, at the very least, safe. The horsemeat scandal caused some harm on consumer trust, but alerts from government bodies do not receive much media attention, so many food safety cases are just not known to the consumer.

With regard to sustainability, consumers are starting to place more importance on where and how food is grown, whether that be for health or ethical reasons. But consumers are more driven by the cost of food and this will supersede trust about sustainability, just as long as they still have trust that the food is safe.

One of the respondents from a **governmental body** notes that consumers inherently have to trust, or even have “blind faith” in food, as food systems are simply too complex to know and verify oneself. The respondent says consumers have a cognitive dissonance between the choices they want to make, and the value judgments that sit behind those choices as to where it's from, how it's been made, and where. Consumers cannot give up on food altogether, hence why the global food supply chain is resilient despite low trust. Scandals do have financial impacts for certain brands or sectors but less so on a global scale.

However, the other three UK government respondents are laying a lot more importance on the awakening of the consumer who now wants to know more about the origin and authenticity of products and is drawn to local foods, in part due to scandals such as the horsemeat scandal. A lack of consumer trust results in behavioural changes and have an economic impact and potentially also on trade. One respondent also notes the non-economical effect of lack of consumer trust, which is the impact on nutrition. If consumers lack trust and avoid a particular group of foods that they feel are unsafe, this will result in a less varied diet. Government agencies can provide consumer trust by ensuring a standard of quality of food and open knowledge for consumers, but at the same time, if consumers distrust food, they may distrust the regulator, which, in turn, can lead to risky behaviours such as ignoring food safety advice.

## Main trust issues

The respondents shared with us what they believe are the main issues around consumer trust in the food supply chain and what they think consumers want/need to build/increase their trust in the food supply chain (Table 2 below). While this is not quantitative, some major themes emerged. Overall, the main themes were supply chain aspects such as transparency, traceability, and providing accurate information, as well as safety and sustainability. We identified slight difference in the focus of different stakeholders. The industry focused more on safety, quality, transparency and reputation/integrity. The media highlighted misinformation, fake news, scandals and the need for companies to communicate honestly. And lastly, national authorities placed the importance on safety, traceability, transparency and also price.

| | Finland | Israel | Italy | Poland | Spain | UK |
|---|---|---|---|---|---|---|
| Industry | • Safety<br>• Sustainability<br>• Transparency | • Safety<br>• Quality<br>• Transparency | • Product (quality, origin)<br>• Small, traditional businesses<br>• The consumer<br>• Production<br>• Price<br>• Safety<br>• Transparency | • Clear, transparent information<br>• Misinformation, no transparency<br>• Brand (size of company, scandals)<br>• Product (composition, origin) | • Information<br>• Reputation of the food sector<br>• Trends | • Animal welfare<br>• Anti-microbial resistance<br>• Environment<br>• Ingredients<br>• Ethics of companies<br>• Integrity of communication |
| Media | • Safety<br>• Ethicalness<br>• Freshness | • Components<br>• Transparency<br>• Honesty (admitting you were wrong) | • Price<br>• Communication (origin and production)<br>• Quality (health and taste) | • False information<br>• Fear of danger Marketing | • Food scandals<br>• Fake news<br>• Clear information | • Negative (social) media attention<br>• Certifications and standards<br>• Complexity of the supply chain |
| National Authority | • Safety<br>• Authenticity (labelling/ingredients)<br>• Traceability | • Transparency<br>• Safety<br>• Companies' history and corporate social responsibility (CSR) | With purchasing power:<br>• Price<br>• Brand<br>• Ability to read the label<br>Without purchasing power:<br>• Trust in donor<br>• Brand<br>• Expiry date | • Irregularities during inspections seen as a negative<br>• Generalisation<br>• Traceability | • Misinformation<br>• Lack of transparency<br>• Food fraud<br>• Lack of education in schools | • Safety & allergens<br>• Enforcement<br>• Lack of transparency<br>• Price<br>• Authenticity<br>• Use by dates<br>• Marketing<br>• Industry focus on increasing consumption |

Table 2: Overview of the main trust issues named by the respondents

## Trust-engendering activities

In this next section, we wanted to focus on tangible trust engendering activities that our informants had or currently are undertaking, within their organisation, their stakeholder group, and with other stakeholder groups, and where they gain their insights into consumer trust levels from.

## Past and current activities

We asked the informants about any current and past collaborations with other members of their stakeholder group and/or with other stakeholder groups towards building/increasing consumer trust; and how successful they have been.

# Finland

The respondent from the industry is an interest and employers' organization thus their collaboration is mostly within political stakeholders, other organizations and public officials, and they do not take part in their member companies' business decisions or policies.

Most activities are indirect e.g. better regulation, stakeholder collaboration e.g. with the farmers' and the retailers' associations, enhancing energy and material efficiency agreement systems, enhancing good business practices together with other stakeholders, and the like.

The respondent from the media has, since 2002, made restaurants criticism and supporting the wide range of concepts with the best practices and best ingredients.

The respondent from a government administration confirms to have very good collaboration among food safety authorities nationally and in the EU around reliable and trustworthy food control, transparency (controls, results), and fact-based communication (website etc). The Oiva-system (four categories of smileys introduced in 2013) publishes food control results (e.g. at restaurant entrance/ food business operators, on the website of the business, and on the website of the Finnish agency) of individual FBOs has been a great success as regards transparency and consumer trust in general. They believe in working together, having open dialogue and sharing common views of all authorities.

The respondent also has a very good collaboration with organizations representing the whole food chain, i.e. agricultural producers, food industry, retail sector and restaurant and catering services, with regard to legal requirements and problem solving. For example, the EU requirement on Acrylamide: Communication with value chain stakeholders on processing details on the ground helps them understand what guidance is needed for businesses and for control agencies to comply with regulation. They also have good relations with universities and research institutes to keep both parties updated on field level findings and latest scientific knowledge.

# Israel

This industry respondent believes each company acts to increase consumer trust on an ongoing basis. One way is by donating to charities, which his/her company did along with the whole food industry for COVID-19. His/her company is also active in a food association that is campaigning about the contribution of the local industry. There is a forum that includes senior professionals, academics, health professionals, various researchers, with the goal is to discuss various pressing issues, including a discourse around processed foods. The purpose of the forum is to exchange views, the industry listens to researchers and researchers listen to the industry.

The respondent also meets with the chambers of commerce that represents the importers. The boundaries of manufacturers and importers are less relevant his organisation because we are both importers and manufacturers. They work with the Standards Institute and the Ministry of Health. This is done routinely, the routine work has more to do with trust than special projects.

The respondent believes the activities are successful as they find that consumers have high trust in them.

The respondent from the **media** is not involved in any initiatives in the food industry but did speak about trust issue in a conference of the food industry. She feels that the food industry only reacts when it is forced to do so (e.g. consumers demanding more labelling). She believes that food companies should speak to their consumers all the time and enounce publicly that it is an excellent reform. It could encourage higher consumer trust in the food industry. The respondent also gave a lecture to a Strauss, major Israeli food manufacturer, about trust.

The respondent from a **regulatory association** confirms that all their operations are with food companies and that they work with them regularly. All of their executives previously worked at food companies. They recently conducted, for the first time in Israel, a large project in which all food companies collaborated to reach a large joint food donation during the COVID-19 crisis.

As a representative body, the respondent is constantly working with the government, such a round table with representatives from the Ministry of Economy, intending to understand food manufacturers' needs and try to release governmental barriers. The organization works ongoingly with the regulator and government bodies. They were part of a very nice initiative with a non-profit association, a multinational project to promoting a healthy lifestyle and preventing obesity. Our respondent believes that multi-sectoral collaborations help getting to know the stories behind companies and increase trust.

The Israel national authority responded is not sure if their actions have contributed to consumer trust. He/she believes that trust needs to be worked on for many years to see results. The 2011 rift and the social protest pointed an accusing finger at the food companies without knowing the data and facts. It is very complex and challenging to be a food manufacturer in Israel. Israel has an industry with much innovativeness and investments for the benefit of consumers. At the same time, there is a large gap in trust, the companies are conveniently portrayed as big and swinish that only want to make a profit, without the understanding that the cost of production in Israel is high compared to other countries.

## Italy

Some of the respondents from the **industry** are working with other industry members to promote trust. For example, one works in the context of small micro-enterprises and has promoted these companies by making small videos and participating in a food expo, to showcase traditional production methods, in order to increase visibility and attract foreign consumers with less knowledge about Italian foods. Another respondent worked on the 2000 "pact with the consumer" to affirm a process of renewal of agriculture but also to open up to the needs of society. This opened the doors for discussions around transparency and origin labelling. Another element is the construction of the Campagna Amica network (Farmland friend), all the producers adhere to the same rules, the same color, the same logo that applies to the whole territory and in fact to commit to selling a 100% Italian product. This makes Campagna Amica a unique experiment worldwide.

With regard to work with other stakeholder groups, the respondents had limited collaboration with the exception of one of the three respondents who collaborates with other representatives of other food chains and together with the ministries concerned (of economic development, agriculture, health and foreign affairs) in the construction of the Italian nutritional label called Nutri informo battery.

One of the respondent notes that the activities are successful in engendering trust, especially with younger clientele, as teaching them something new such as how to cook will make them see the company as trustworthy generally, including their production. The second respondent notes that both producers as well as consumers support the request to the European Parliament to make original labelling mandatory, hence indicating to the respondent that they are on the right path.

The respondent from the **media** told us that they are part of a festival where they talk about communication issues between journalist and consumers. In February, they also launched a campaign against food waste to introduce the mandatory leftover bag in all restaurants. For them, the full bag is a great communication vehicle because you can write about how to store food so as not to waste it.

The respondent also has partners that are consumer associations, trade associations, companies, foundations, universities, research groups, political institutions. The respondent points to the need to make sure that they hear about the other stakeholders' communication problems.

Their impact may not be quantifiable, but they have given a voice to 500 speakers, which certainly had an impact.

The respondent from a **consulting NGO to the (***)** points out that there have been training and education activities linked to consumer associations on the topic of "use by" and "sell by" dates as well as conservation methods to prevent food waste. These European and Italian projects involve also distributors, producers and consumer associations and also with control authorities, such as veterinarians, preventive medicine, who are the ones who carry out checks in the supply chain on quality, hygienic safety of products. However, purely governmental activities on food systems seems limited.

## Poland

The **industry** respondents are involved in a wide variety of activities, such as work on consumer education by providing reliable knowledge about via a website, the "Keep the Form"" program which educates among others students about food (including e.g. labelling methods),  "Voluntary Nutrition Labelling Program RWS" project, education food additives, and busting myths via social media. Moreover, AGREEHUB was mentioned, a food passporting project that the creator wants to implement with several large companies. They are also informing consumers about alternative ways of growing products without pesticides. Furthermore, they are involved in initiatives with retailers such as Carrefour and Frisco with regard to local products, as well as the "Zdrowe zakupy" ("Healthy shopping") application, where products are rated with regard to their healthiness.

With regard to other stakeholder groups, the respondents mentioned working with non-governmental organisations (NGOs) on animal welfare by informing consumers about the product, as well as on the safety and environmental issues of poor food packaging. Lastly, they also educate journalists through workshops on food controls, authorisations and labelling requirements.

They believe that their actions to build consumer trust have their merit, as trust is easy to undermine but difficult to rebuilt.

First and foremost, the **media** respondent prefers working directly with consumers, providing them with reliable information. The respondent's organisation publishes, amongst others, the opinions of nutrition experts or industry experts not related to any producers. Editors try to make the message truthful, and objective. They also organise paid, closed events for companies from the sector. These events are not targeted at consumers. These events have no educational dimension. At these meetings, participants talk about trends, consumer behaviour, etc. that affect the strategic decisions of companies.

The respondent of a **national authority** confirms to be working with another government agency regarding the issue of warnings and information on irregularities. They also consult with industry associations on priorities that help companies, e.g. on entering a large market or maintaining producer group standards. They do not cooperate with food certification systems. However, this is good because it sets out requirements that must be met by entities that go beyond the requirements of the law. Thanks to this, there is no disturbance in the sphere of control and auditing by external companies. It is the responsibility of the institution to verify compliance with the rules in accordance with existing state regulations. The fact that companies comply with external rules that go beyond regulations is beyond the institution's competence.

If someone comes with an initiative proposal, they are usually trade associations that see the problems of their entities. Then the initiative of meetings, training, expanding knowledge and creating tips to solve problems take places. An important initiative is to transfer knowledge and set a goal. One of the last initiatives is the preparation of guides for producers and small producers (agricultural slaughterhouses). These guides also available to consumers. They have also recently met with trade unions to agree or come up with and discuss certain issues.

According to the respondent, initiatives promoting food in the media are effective. She recalls the case when one of the meat trade unions invested funds in a beef promotion campaign, successful especially after the events that took place last year (disclosure of irregularities in the matter of meat). Activities such as organizing campaigns or advertisements showing health aspects are positively correlated with the process of building consumers trust. What is also effective is showing the pro-ecological and health-promoting relation, e.g. showing the impact of dairy products on health and well-being. According to the respondents, these actions have the greatest impact on consumer confidence in food.

# Spain

The respondent from the **industry** collaborates with the producing agents: farmers and ranchers, industry and distribution. They recently carried out a campaign related to trust in collaboration with some associations to enhance the agri-food system, taking advantage of this difficult situation. With regard to other stakeholder groups, they undertake some work with the media (through press releases) but do not collaborate with government administrations.

The Spanish industry respondent believes that the exceptional circumstances of the COVID-19 pandemic have made it so that the media has an impact on consumer trust, but in general the media does not show an interest in the sector.

Currently, the respondent from the **media** does not carry out joint activities with other media, although he/she would find it interesting. Some campaigns are published in different media, but it is not a collaboration as such.

The media respondent works with policy makers, industry and consumer associations. They recently organized a workshop with a regulatory body about the topic of listeriosis, to discuss the mechanisms of security and alert that are applied in the food industry. They covered the workshop which was called "Food Security in Spain", and tried to inform the general public that the system works and explain all the work behind it. The industry also participated and that helped to show that the administration and the industry collaborate so that in the end the product is of quality and safe for the consumer. They also collaborated in the past with this regulatory body in a campaign on acrylamide. In addition, they participate in many forums and workshops on food safety, sustainability, innovation, and more. They also claim to have a good relationship with consumer associations.

This respondent believes that all these collaborations are highly valued.

The **national authority** collaborates more with their European counterparts. However, communication activities are scarce because it is at national discretion. They mainly follow EU guidelines and echo campaigns they carry out. At the national level, collaboration with other administrations is scarce. However, there is a round table on fishery and anisakis issues in which we collaborate with the Ministry of Agriculture and three representatives of the sector to communicate any matter related to the anisakis problem in a transparent way and thus gain consumer trust. They collaborate more with Colleges of Doctors and Veterinarians, Universities, but not on initiatives specifically focused on the consumer.

With regard to other stakeholder groups, the respondent explains that they mainly collaborate with commercial operators, since they have a very good relationship with the different actors in the food chain. They frequently meet with the(***). Most of the actions they conduct are together with associations representing a large majority of the sector (at least 80%) and not specific collaborations with brands. They avoid associating the agency logo with any brand. They also participate in food forums or conferences organized by associations representing a vast majority of the agri-food industry.

The respondent receives little feedback about effectiveness, but do use the European Commission's Eurobarometer once every 5 to 10 years for food safety. They do not use very quantifiable indicators, such as queries that come through the web and that give an idea of whether these consumers trust the system or what doubts they have. They are also in contact with the autonomous communities, which are the ones that have the most contact with citizens and operators.

# UK

Activities of our **industry** respondents include work on Agri-search beef, which is research that increases productivity, on the better use of ground (including ground/water management), grazing practices and carbon-efficiency, as well as sympathetic grazing of tourist/natural beauty sights. Moreover, they have made a TV ad, and a communication piece about palm oil to react to all the consumer questions they were receiving. With regard to other stakeholder groups, they work with meat exporters and other governmental bodies as well as the media.

The **media** respondent's answers could not be disclosed without revealing the identity of the respondent.

The respondents from **national authorities** are reporting to provide advice on COVID-19 via social media platforms, work on labelling of drinks through technology that allows for a limitless access to information, conducting surveys and tracking consumer behaviours, developing policy interventions with the help of communication colleagues (e.g. on best before dates). A respondent notes that the role of national authorities is not to work actively on trust, as trust should come whenever they do not need to signal an issue such as the BSE scandal. They also work across government.

With regard to activities with other stakeholder groups, the respondents liaise with trade associations and representative industry bodies to talk about safety and guidance and compliance. They have good relations with major food companies and work very closely with them to encourage further best practises. They also liaise with manufacturers to develop or to agree on codes of practise for best practises, best hygiene practises, practises, best storage practises, and the like. Higher standards are then forwarded on to the consumer and the consumer trust. They also work with healthcare providers and non-governmental organisations.

With regard to effectiveness of the activities, one of the respondent notes that a key point of a campaigns is that they do have to be reiterative to be effective, as well as targeting both the national level and more local level. Another believes that the increase in transparency of supply chains such as palm oil has successfully improved consumer trust.

## Resources

We asked the respondents where they retrieve their insights on consumer trust in food from, see Table 3 below.

| | Finland | Israel | Italy | Poland | Spain | UK |
|---|---|---|---|---|---|---|
| Industry | Different studies, e.g. Suomi Syö. | Marketing research and other research that they do directly or get from companies that do it | Experience and daily relationships with their businesses, research bodies. | Other businesses, consumer organisations, reports and research of members, restaurant rating website | No mechanism to retrieve consumer insights in trust with exception of recent survey (yet to be released) | Twitter trends, giving lectures, watching the media, and seeking research |
| Media | The major Finnish food industry players produce and sell food without getting consumer insights, as the consumer cannot vote with their wallet anyway due to limited alternatives. First consumer needs have to be met before trust can arise. | *Received most of her insights from a previous position (in a company not related to food)* | Media, social media, consumers | Visits of food processing plants, conversations with entrepreneurs, the number of exports as an indication for consumer demand, comments to articles | Feedback (comments) on social media, interaction with consumers associations | Insight companies, YouGov, consumer research of various vendors who do their own, Twitter, emails from readers and their experience as consumers |
| National Authority | People, stakeholders, other authorities, media, and specific survey-based studies. | Previous work experience at a non-profit association working on transparency issues. | Large network of people, including consumer associations, distributors, and people from events at national and international level, for example in Brussels. | Own work experience and successful initiatives | Contact with consumer organisations | Surveys and regulatory tools used for behaviour change |

Table 3: Resources to gain insights in consumer trust

## Future needs

Lastly, it was important to us to understand if/what they were planning to undertake in the future as trust engendering activities, what challenges they encounter and what barriers prevent them from undertaking activities. Based on their experience, we asked for recommendations to others and wishes for the future.

## Future activities

We asked the respondents the which activities they would like/have planned to undertake in the future to increase consumer trust in the food supply chain, with other members of their stakeholder group and with other stakeholder groups; as well as what the reasons/obstacles are.

# Finland

The **industry** respondent plans to continue the good collaboration with the members and other stakeholders to enhance sustainability, transparency and product safety. Sometimes the lack of time is an obstacle not to enhance certain activity.

The **media** respondent is working with a group of best chefs and restaurateurs in Finland to plan for the road to 2030 with regards to the COVID-19 pandemic and consumers needing to trust to visit restaurants again. There is a threat of bankruptcy for farmers, small producers and restaurants. The main barrier to making these things happen is money.

The respondent from a **government administration** plants to continue with open dialogue and constructive co-operation to work towards common goals. In Finland, food sector is in general considered to act responsibly and they share the same values with food authorities, which makes it fairly easy to work together and communicate along the same line. The slogan “from control to coaching” that was launched a few years ago has been a success in attitudes of inspectors and resulted a better understanding of legal requirements by Food Business Operators (FBOs). This has also improved compliance, transparency and consumer communication. They also plan to develop their website to be more user friendly and to provide fact-based consumer information. Challenges include correct timing and resources. In case of emergency, very quick response is needed.

# Israel

The **industry** respondent is unsure whether the current activity they undertake, a discourse between manufacturers and opinion leaders, will achieve the best results. The respondent believes that not all wisdom is to be found within food manufacturers nor within other stakeholders such as academy, medicine, government ministries, etc because they sometimes they lack the specific understanding of food, what is possible, what does not exist and is not possible and what are the alternatives.

The **media** respondent thinks that activities on consumer trust are very important for companies and for countries, especially in food, where she is not sure how well it is understood yet. Food companies did not leverage the corona crisis enough. Companies are not taking the opportunity to communicate sufficiently. They are angry that people do not praise the local products but they do not say it aloud. The respondent believes that it is important to regularly remind consumers, who tend to forget fast. She believes one only gets trust if one asks for it. She does not take any action because it's not relevant to her. However, she will be happy with the food industry's success.

The **regulatory association** does not have any project on trust specifically, but take steps that build trust, including for consumers to learn more about companies. The respondent would very much like to establish a multinational program to fight obesity. This will require collaboration between various ministries, non-profit associations, manufacturers, and the academia. All actors should work together to create a fundamental change in that field. He/she would also be happy to establish a project that breaks down the price of food components that allows consumers to understand products' actual costs and manufacturers' actual profits.

The obstacles are resources and manpower. The respondent's organisation is constantly engaged in immediate, burning issues and therefore never get to performing these tasks. It is not a business entity and therefore it is more difficult to devote resources to these things. In addition, to establish such a project they would need to generate trust between different bodies. Inter-sectoral trust is no less challenging than multi-sectoral trust. The respondent learnt this in the food donations project, it was hard to overcome trust issues between different bodies from the same sector.

# Italy

The **industry** respondents plan to teach businesses them about proper hygiene measurements for consumers who shop in their stores during the COVID-19 pandemic; creating a website; tackling transparent labelling including origin, for example by adding at the base of the food pyramid, in addition to physical activity, the consumption of local food and conviviality as a unifying element, or by giving preferential lanes in contracts for public procurement to local products; and with the other stakeholders, they are discussing a proposal a European governmental body.

Obstacles are lack of money and the high complexity of the system. Improving, for example packaging to be fully compostable has a cost that necessarily falls on the price of the product. This is a not insignificant element of risk especially for companies that are a bit smaller than having non-standardized productions they necessarily have more expensive products than those found in supermarkets. During the COVID-19 pandemic mandated lockdown of Italy, the only place consumers could buy food was at supermarkets because almost all other shops had to close down. The respondent finds it important to pay attention how this changed consumer behaviour. Another obstacle, especially with regards to origin labelling, is the lack of will of the food chain, due to the fact that they know that the consumer would not be so inclined to the use of foods that come from a region that is known to exploit the workforce, child labour or the use of pesticides.

The **media** respondent tries to find new themes every year, for which they try to anticipate what will be relevant. For example, when there were first signs that food was going online, they dedicated a panel to e-commerce food, or how they focused on food delivery since the COVID-10 pandemic.

The obstacles are the poor pay of journalists to lead to a "copy and paste" culture because they cannot spend time in training or digging deep into a topic through expensive, long investigations. Journalism, in the respondent's eyes, needs to be recognized as a profession.

The **consulting NGO to (***)** respondent explains that the trust has moved from the brand or product to social media influencers, even though they can produce fake news. The consumers do not know how to evaluate what is serious and what is not.

# Poland

One of the two **industry** respondents plans to work on vertical crops of the AeroFarms type, emerging on the outskirts of cities. This is going to be accompanied by communication that they are environmentally friendly and the producer is close to the consumer. In Poland, there are no such crops yet, but abroad in the restaurant you can find glazed cabinets in which there are crops. This gives a message to the customer that the crop is next to him, he can see it and see what goes on his plate. This guarantees the safety of the entire food supply chain, which the customer often does not realize.

They identify the barriers as being huge financial outlays and lack of money, as well as a lack of communication, a lack of support for initiatives and interest outside of creators and users.

The **media** respondent says that journalists suffer from readers who do not believe that the photos posted show the real interior of companies or the actual conditions of animal agriculture.

The **national authority** respondent plans to create an IT system to implement a rating system where consumers can see which actors meet the requirements. This will create transparency and trust. The respondents finds that people are the weakest element of any production system because the human factor is out of control (even well-instructed entities will always do something their own way). This is where the role of institutions is: to stand next to the producer, observe what actions are taken or whether they are adequate to the certain situation. Control is based on trust and keeping the lights on.

# Spain

The **industry** respondent would like there to be information campaigns from public administrations that explain to society all the positive aspects of food production. They could be supported by other sectors, but it would have to be the public administrations that did them. The challenges lie in the fact that most of the companies in the sector are SMEs and do not have the means that large companies have to access communication to the general public, and that contact with the public administration is scarce.

The **media** respondent would like to, along with other specialized media, have a meeting to discuss how they could approach the topic of consumer trust together. In order to reach the general public, the campaign would have to be very broad, for example to include contents on how controls are done in the industry in in TV programs. Written media such as journals have less scope, but the respondent always try to insert visual contents. The respondent would also like to do the same with public administrations and the food industry. The challenge is that they do not have the means to carry out large information campaigns. Many sectors have to be put in contact, which is very difficult.

The **national authority** respondent would like to work more with other national authorities, especially in aligning the communication to the consumer as currently, coordination is lacking between ministries. The respondent also says they are always open to collaborate with commercial operators which will be implemented next year. The barrier is the lack of resources, both financial and human, to the different interests and the tendency to immobilism of public administrations.

## UK

Th **industry** respondents plan to improve branding and traceability of products, as well as labelling, in the light of Brexit potentially opening the doors to unsafe practices (spraying, carcinogenic sprays etc), as well as well as launching an environment-focused brand that encourages moving to vegetarian or flexitarian diets. They identify the barriers as being the food service sector and labelling that needs to be further tightened. There needs to be genuine integrity and create a legacy over time, not forcefully.

The **media** respondent would definitely run more webinars, which would give people in the sector the chance to talk about, standards or hygiene, as well as more opinion pieces from the sector talking about the quality of their produce. With other stakeholder groups, the respondent wants to continue dialogue and exchange but no specific projects are planned. The respondent finds it difficult for a brand to communicate properly about improvements. For example, if they improved food safety and notify the consumer, this may make the consumer think that the products may not have been safe before, and hence the consumer makes a negative association. Most brands that are satisfied with the current situation do not bother with improving it, unless there is an actual problem that needs to be rectified. At the same time, the respondent finds that there is a consumer movement to care about food more, which forces brands to keep up with their competitors.

The **national authority** respondents find it difficult to talk about the future given Brexit. They wish to maintain standards but might undertake activities or legislation which may not align with the EU in order to maintain the UK food economy. It is, therefore, difficult to tell what the impact the consumer in the future will be. Some activities that could have increased transparency have been paused due to Brexit, but they are still undertaking activities across government that may increase trustworthiness in the future.

Challenges are mostly financial. The COVID-19 pandemic obviously knocked every government's potential in terms of research and development funds. If we go into a global recession or depression, consumers buying behaviour will change just like in 2008. However, this may affect housing and holidays before it will food.

# Recommendations

We asked respondents what they would recommend to stakeholders along the food supply chain who want to increase consumer trust, based on their own experience so far.

## Finland

The **industry** respondent recommends increasing transparency, put resources on enhancing sustainability, and create a good story.

The **media** respondent recommends listening to what consumers want and need. The law is the minimum level of the safety issues, the basic level of trust, not necessarily what consumer think as a main trust factor.

The respondent from a **government administration** would recommend openness, truth, and responsibility. For example, in Finland recalls and withdrawals are considered to be measures that show responsibility.

## Israel

The **industry** respondent recommends acquiring knowledge using it to do the best one can do within the given possibilities. In any professional setting - safety, nutrition, product communication.

The **media** respondent recommends labelling as communication tool.

The respondent from a **regulatory association** recommends to food manufacturers to communicate as much as possible with their consumers, and to be transparent. For example, consumers may find that the text on a package is too small but manufacturers have to comply with the standards. This is where they can be transparent and communicate with the public. The government should encourage the purchase of made in Israel products, and should encourage a deeper acquaintance with food companies.

## Italy

The **industry** respondents reiterate the need to always increase the quality and then add a service, as home delivery and offers within shops, to promote not only the product but shows the company in a different perspective and not only linked to mere profit. They recommend giving visibility and creating trust through tools that guarantee food traceability, e.g. blockchain, as well as highlighting true craftsmanship, or restaurants that have a visible kitchen. There was also emphasise the importance of origin labelling to consumer confidence in the use of their products. This also means having the courage to change your production cycles, for example to facilitate the use of the regional or local product even better, and therefore a more sustainable product.

The **media** respondent believes the industry needs to spend resources on information and communication and then honestly communicate the product, on package and beyond. For example, hamburger advertisement should not be "buy this hamburger" but the company should do a service on cows, on what they ate, on what meats were mixed for the hamburger, how they are traced, if they have bacteria, etc. There is a lot of information that companies can produce on their own and then journalists produce theirs, so the consumer has the information to make informed choices and maybe be less attracted to fake news.

The **consulting NGO to the (***)** respondent puts the importance on the consistency between what one says and what one does. The message needs to be simplified but not trivialized.

## Poland

The **industry** respondents recommends to be transparent and reliable in the information provided; then to not mislead the consumers; urgent tracking of all legal provisions; quality control; fighting dishonest players. The basis for building consumer trust is honesty, openness of communication and authenticity. For consumers, the distinction between quality and trust is not entirely clear. In the context of food, authenticity is one of the important measures of quality, it is even more important than sanitary parameters. The consumer will choose a product that is more questionable if it gets authenticity in return: the case of ethnic cuisine. The consumer decides what is authentic. Therefore, the respondents recommend being careful in creating messages.

The **media** respondent recommends fighting misinformation regarding food and its safety, because when the consumer does not know what is correct information, he/she believes it everyone is cheating on them. Only an extensive campaign might change the perception of a given product by the consumer, without repeating so much that the consumer becomes numb to the message. It would require the cooperation of the entire market, which is challenging to implement.

The **national authority** respondent recommends an information campaign, recalling the pros of supporting Polish production. Operating in organisations is beneficial for actors wishing to expand production and sales to other markets. Large actors have more influence on international level arrangements.

# Spain

The **industry** responded recommends promotion. Most operators do things well, but they need to know how to reach the general media.

The **media** respondent recommends transparency.

The **national authority** respondent recommends increasing the transparency and consumer communication (accessible and understandable labelling); putting the consumers above economic values; and respecting the rules and regulations (no food fraud, contradictory messages, etc).

# UK

The **industry** respondents recommend Protected Geographical Industry (PGI) for Northern Irish meat, publishing specifications of retailers, labelling and traceability, retailers supporting local produce (for example, ASDA used Polish beef, which, according to the interviewee, is an issue), quality tests (especially for meat), focusing on the welfare of the products and farmers, and lastly treating food as a public good. Another recommendation was industry compliance and truthfulness.

The **media** respondent recommends dialogue with journalists to shed light on more parts of the supply chain, such as what happens in between the farmer and the supermarkets.

The **national authority** respondents recommend focusing on local suppliers, especially in the light of both COVID and Brexit, to cushion the blow when moving away from European subsidies for farming. They also recommend transparency and openness, as well as meeting legal obligations.

## Effects of COVID-19

We asked the respondents what they expect the long-term effects of COVID-19 to be on consumer trust and on building/increasing it.

## Finland

The **industry** respondent thinks that during the lock down the consumer trust might have slightly increased since the food supplies were running normally. In the long run, consumers demand for more transparent and shorter food value chain might increase.

The **media** respondent expects COVID-19 to stay among us and that it will change the pattern of consumer behavior. Internet and web shop / food delivery concepts will increase. The traditional supermarkets should change themselves more into "learning shop" experience – there need to be other reasons to visit super market, not only food because food will find you any way with delivery concepts.

The respondent from a **government administration** sees two long-term effect of COVID-19: 1) Food availability and consumer awareness, which may trigger bigger questions on sustainable food production internationally (self-sufficiency?). 2) Food safety. COVID-19 itself has at the core little to do with food safety but the consequences of COVID can be a food safety issue. When labour in food production/ processing become sick, producers/processors have to hire potentially less skilled labour and thereby hygiene standards may be compromised.

## Israel

The **industry** respondent does not think the effects of COVID-19 are related to public trust in food.

The **media** respondent believes that consumers forget scandals quickly and COVID-19 may not have long-term effect on consumer confidence in the food system.

The respondent from a **regulatory association** hopes that consumers will remember that manufacturers worked hard and there was no shortage of food despite the crisis, but is sceptical about it. An important conclusion that emerged from the COVID-19 crisis is the importance of a strong and independent local food industry. Israel's food industry has shown that it has the ability to stand on its own feet without the help of other countries. Israel's goal is to open up as much as possible to imports, which is a positive thing.

## Italy

One **industry** respondent is completely confident that COVID-19 will not affect consumer confidence long term, and if it did it would do so overall and not on a specific product. Others believe that consumers now pay more attention to local products, from which small companies benefit. The pandemic brought consumers closer to the consumption of more genuine, less ultra-processed food. It was a temporary experience but may stay in the habits of the Italians. Less positively, the pandemic has greatly increased the costs of businesses, which can have effects both for the food chain and then also translate on consumer confidence.

The **media** respondent believes has made consumers even more health conscious, especially about sanitization, even among young people.

The **national authority** respondent estimates the effect of COVID-19 to be less on the food aspect compared to other things because fortunately, it was seen that food was the only thing we could access during the darkest moments.

## Poland

The **industry** respondents believe that the effects will be the new requirements for processing with regards to hygiene and the fact that consumers realised that something as omnipresent as food is not always a given. It showed us the importance on the entire food supply chain and that it is impossible to produce food remotely. An interesting observation was that consumers have less of an issue with plastic because they value their own health more than the environment.

The **media** respondent stated that in Poland, the COVID-19 pandemic did not lead to panic nor rumours that coronavirus was transmitted through food. In the long term, there may be changes in the area of consumer purchasing behaviour and purchasing channels that consumers will use. For example, in Poland, in COVID-19 situation, there has been a specific reduction in the purchase of sausages and meat from the meat counters in stores that Poles love. It resulted, however, primarily from the fact that shopping during a pandemic ceased to be pleasant. Consumers have to shout through the glass, and attention is paid to whether the seller is wearing gloves. However, the level of security or cleanliness is high in modern stores now. The respondent also added that the coronavirus has a more significant impact on gastronomy, where it forced the closure of some companies for some time or permanently. However, these problems are not strictly related to food safety nor diminishing consumer trust.

The **national authority** respondent states that the pandemic showed that the manufacturer's responsibility for products placed on the market is important. If he is responsible and produces in accordance with the rules, there is no threat to safety. The problem occurs when an employee of the entity falls ill and requires replacing. The respondent also notes that the pandemic has led consumers to appreciating local products more. The respondent suspects that there will be more frequent guests in stores and bazaars, as part of direct retail trade, especially when it comes to animal products. Consumers will shop where they think products are healthy.

## Spain

The **industry** respondent does not think that COVID-19 will have an effect in the long-term unless there is a second lockdown. If not, the media will continue to highlight negative news of the food sector instead of positive news, and consumers will forget how good the sector is.

The **media** respondent does not think COVID-19 will have a negative impact on the consumer trust on the food supply chain. It has even had a positive effect at all levels, from the farmers to the supermarkets, and has shown the importance of every part of the food chain.

The **national authority** respondent says that they have not been affected and that, in fact, the agri-food system has been strengthened, since it has been identified as a strategic sector. It has placed more importance on public health, which integrates food security. Online commerce and consumer confidence in this type of sale have increased. The political debate might have a negative impact, since there is an erosion with respect to the administration that “contaminates” more technical agencies.

## UK

The **industry** respondents foresee minimal long-term effect on food itself, aside from consumers being slightly more inclined to buy local products. However, the recession will be a more dominant, longer term driver of trust than COVID. One respondent does point out that maybe trust in food or brands could have even been increased due to the comfort and the state an emotional connection they offered during these difficult times.

The **media** respondent believes that companies that were quick to fire employees might be affected in the future if consumers remember how they dealt in the situation. Once routine comes back, consumer worries will be back to where they were before.

The **national authority** respondents think that perhaps consumers will have a greater appreciation and understanding on the criticality and indeed the global nature of the food chain, even if no change in trust per se. Consumers will be even more interested in local produce and secure supply chains. However, the global recession or depression that may be coming on may have a negative impact on consumers.

### Wishes for the future

Lastly, we asked the interviewees to state a wish in the context of consumer trust.

## Finland

No response could be obtained from the interviewee from the **industry**.

The **media** respondent wishes for us to think about the meanings of food in terms of culture and a healthy life, and to find the new trust factors, not only microbiological or new tech and agribusiness solutions.

The **government administration** wishes for trust in facts, not fake news.

## Israel

The **industry** interviewee wishes that the discussion were based on scientific truth, whether it be about COVID-19 or food in general, e.g. monosodium glutamate.

The **media** respondent wishes to not need to check products thoroughly before buying them once trust is high enough.

The respondent from a **regulatory association** wishes for trust to be grounded in truth and not blindly trust what is published in the press, ignoring scientific discourse. The consumer will better understand that the local industry produces high quality and safe food. The respondent also wishes for consumers to communicate and speak-up about the things that bother them and demand change where necessary, e.g. through a law that would oblige consumers to send a request for change to companies before being allowed to file a lawsuit. He/she also wishes that consumers knew how many people the food industry employs and that they come from all religions and genders. The respondent also wishes that the media would not undermine the resilience of Israel by posting juicy news items that hurt consumer trust.

## Italy

The **industry** respondents wish for safe and high quality foods and for consumers to rediscover local food and getting themselves informed.

The **media** respondent repeats that the consumer should be provided with more information, otherwise they will base their opinions on fake news. The respondents dream is that more communication is done, along with a relationship with science. Therefore, scientists, companies, communication agencies and consumers all need to work together.

The **national authority** respondent wishes for people to have passion to educate themselves to allow them to make those purchases that they can trust. Trust is something that is built over time and one cannot be passive.

## Poland

The **industry** respondent believes that although people may not be truly interested in food, it has become a lifestyle over the past ten years. It is trendy to post food images on social media and that people define themselves by the type of food they eat and the way they eat. The respondent points out how much this has changed from the past.

The **media** respondent already believes that food safety in Poland is adequate. Some threats for the future lie where producers do not want to fully inform consumers but someone else informs the consumer. Unfortunately, employees of these public sanitary organizations are not well paid and therefore do not have the appropriate education.

No response could be obtained from the interviewee from the **government authority**.

## Spain

The **industry** respondent wishes that the consumer receives truthful and sufficient information to know and value the products that arrive at our homes.

The **media** respondent wishes for the consumer to be educated about food, for example in school. The respondent would also find it interesting have spaces for dialogue where the consumer can ask and comment.

The respondent from a **government administration** wishes for more focus on food issues in schools. For this, there would have to me more resources for these agencies that allow them to become benchmarks to fight misinformation.

## UK

The **industry** respondents wishes for every food to be fully traceable; that consumers would look at the facts and interpret the facts in a rational and logical and objective way to make their decision, as opposed to being media fuelled or social media hyped or misled; that brands act with integrity; and for the media to create less scaremongering.

Interestingly, the **media** respondent jokingly wishes to find a great story about a breach of consumer trust by a major food company.

The **government** respondents wish for appreciation for their messaging; for consumers to know how food was really produced in order to make informed and empowered decisions; transparency; and sustainability.

# Annex

## Invitation email

Subject: Interview invitation – EIT project Grand Challenge on Consumer Trust in food

Dear *[name]*,

As part of the EIT Food Grand Challenge on Consumer Trust project, we are looking for key informants from the industry, media and policy that would be interested in sharing their expertise on the issues around consumer trust in food are and what activities they are undertaking to build/increase consumer trust in food.

### What's in it for you?

Are you interested to know more about what consumers think about your stakeholder group, to learn about how you can engender consumer trust and to see what others are doing? Then this is your chance!
Participate in our interviews as a selected member of *[the media/food industry/policy maker]* and receive a full analysis of all interviews later this year.

### How this works

At EIT Food, we are currently working on the Grand Challenge on Consumer Trust: Here we work with consumers, food companies and other stakeholders (industry bodies, non-governmental organisations, regulatory authorities and policy makers, media) across 6 countries in Europe and Israel to co-create and implement selected measures undertaken by food companies, food industry and others to engender both greater consumer trust in food and greater support for food companies and other food chain actors. Lessons learnt will be communicated widely and successful initiatives (as assessed by consumers) will be publicized and rolled out by food companies and organisations more widely. Consumers will drive the process at each stage, from voicing concerns and co-designing initiatives to evaluating the success.

As part of this, we will carry out a series of interviews for which we have selected you and your organisation as a key participant due to your expertise in *[personalized for each key informant]*.

### The interview

We would like to ask your views as an expert: Please share with us your thoughts and ideas in your capacity as a member of *[the media/food industry/policy maker]*.

1. Consumer trust around food: What is it; what are the issues; what is your role?
2. Trust-engendering activities: What activities to you undertake to build/increase consumer trust? Where do you get your insights on consumer trust in food? Do you collaborate with others?
3. Future needs: Which activities would you like to undertake in the future?

### What you need to do

If you are interested, please reply to this email indicating your willingness to participate. We will then send you an information package including informed consent form, the full questionnaire, and a doodle poll to set up an interview date.
We will collect data in June/July and will provide results in autumn 2020.

## Consent form

This interview is part of a research project within the EIT-Food network, and focuses on consumer trust in food. The project takes place in six countries: Finland, Israel, Italy, Poland, Spain, and the UK. Based on the collected data, a report will be drafted and shared with the EIT-Food network.

The interview will last approximately 30 minutes. There are no right or wrong answers, we are simply interested in your views as an expert in *[personalised for each interviewee]*.

I understand and agree with the following terms:

- I voluntarily participate in this interview. I have the right to stop my participation at any time. I don't need to give a reason for quitting and I know that this has no disadvantage for me.
- The results of this research will be used for scientific purposes only and may be published.
- I understand that my personal name will not be shared and I agree with the following use of my data: *[please select one]*
    - To be fully anonymous (only stating my stakeholder category, eg "major food retailer"); OR
    - To be partly anonymous (only stating the name of my organisation).
- I know that I can always contact the partner responsible for these interviews for questions, complaints or more information: EUFIC, Katharina Wachter Katharina.Wachter@eufic.org,
- I know that for any complaints or other concerns regarding ethical aspects of this study, I can contact the project coordinator: University of Reading, Prof Richard Bennett r.m.bennett@reading.ac.uk.

EIT Food and its research partners operate in accordance with the MRS (Market Research Society) Guidelines in full compliance with GDPR.

I hereby give informed consent.

______________________

Name, date

## Interview Outline as provided to respondents

In this interview, we are interested in your views as an expert: Please share with us your thoughts and ideas in your capacity as a member of the [industry/media/government].

### General information

a. What is your current position?
b. Tell me about your main tasks at work.

### Consumer trust in food actors and the food supply chain

a. Why do you think consumer trust in food is important?
b. What are the three main issues around consumer trust in the food supply chain?

### Trust-engendering activities

a. Do you currently/did you in the past collaborate **with other members of your stakeholder group** towards building/increasing consumer trust?
    i. And if so, what do you currently undertake as activities to build/increase consumer trust in your stakeholder group?
b. Do you currently/did you in the past collaborate **with other stakeholder groups** along the food supply chain towards building/increasing consumer trust?
    i. And if so, what do you currently undertake as activities to build/increase consumer trust outside of your stakeholder group in other parts of the food supply chain?
c. Do you believe these activities have built/increased consumers trust in your organisation?
d. Where do you get your insights on consumer trust in food?

### Future needs

a. Which activities would you like/have you planned to undertake in the future to increase consumer trust in the food supply chain?
    i. With other members of your stakeholder group
    ii. With other stakeholder groups
b. What are reasons/obstacles that make you not undertake such activities?
c. Based on your own experience so far, what would you recommend to stakeholders along the food supply chain who want to increase consumer trust?
d. What do you think will be the long-term effects of COVID-19 on consumer trust and on how to build/increase it?
e. If you could state a wish in the context of consumer trust, what would that be?

# High-level Gap Analysis

This activity has received funding from EIT Food, the innovation community on Food of the European Institute of Innovation and Technology (EIT), a body of the EU, under the Horizon 2020, the EU Framework Programme for Research and Innovation

| Deliverable | |
|---|---|
| Title: | High-level gap analysis |
| Type of Deliverable | R: Document, report |
| Authors: | Niloofar Borghei Razavi<br><br>Irene Garnelo-Gomez<br><br>Kevin Money |

# Executive Summary

In the first year of this EIT Food Grand Challenge project (2020), partner countries (Finland, Israel, Italy, Poland, Spain and the UK) have conducted a number of focus groups and a Delphi survey with consumers; as well as workshops and interviews with industry experts to gather insights on consumer trust in the food supply chain. The aim of this report is to bring together the insights collected through the abovementioned methods across the six countries, with the aim of highlighting the gaps between consumers' and industry's views on issues related to trust. This gap analysis enables us to identify future initiatives and industry actions that can improve consumer trust in the food supply chain and its actors.

After a brief introduction, in which sample characteristics in relation to the four methods of data collection across the six countries are summarised, the high level gap analysis is introduced (Section 3). In Section 4, implications for future EIT projects and implications for industry in relation to the gap analysis are explored. At the end of the report, some potential ideas regarding the crowd ideation are proposed (Section 5).

Key insights from the cross-country gap analysis suggest following areas of **convergence** between stakeholders (primarily consumer and industry perspectives):

- Increasing transparency (at all levels e.g. from marketing, manufacturing, farming and consumer use) is associated with increased levels of consumer trust.
- Traceability across the supply chain is seen an important initiative in building trust with consumers.
- Sustainability initiatives are seen to improve consumer trust.
- Farmers are seen as the most trusted actors of the food supply chain

The report concludes with insights on how these findings can inform trust building activities moving forward. One key suggested focus is on communication (including campaigns and labelling) that can encourage all stakeholders to engage in more transparent actions. We also note areas of **divergence** from the gap analysis that future trust building activities should consider. These include: levels of trust in authorities, the importance of locality to trust and importantly the concept of communication itself. In developing communications to improve trust, it is important to consider: Should it be two-way or one-way? Are consumers really interested in communicating with food chain actors? Will food chain actors really listen to consumers?

We conclude by suggesting how next steps in the EIT Grand Challenge (e.g. the Crowd Ideation) can build on these insights and provide answers to some of these questions.

# Introduction

The data for this report has been gathered through focus groups and a Delphi survey with consumers; and workshops and interviews with industry experts.

Overall, 33 virtual **focus groups** with a total of 163 participants from members of the general public (between 24 and 20 participants per country) were conducted. Each focus group lasted for about 2 hours. Moreover, a consumer **Delphi survey** with 2199 participants (366 participants in Finland, 364 participants in Israel, 369 participants in Italy, 366 participants in Poland, 365 participants in Spain, 369 participants in the UK) was conducted.

Furthermore, 9 **industry workshops** were held across the six countries, with a total of 56 industry experts participating in them. More specifically, one 2-hour workshop with 7 industry participants was conducted in Finland, two industry workshops with a total number of 10 participants were conducted in Israel, one industry workshop with 8 participants was conducted in Italy, two workshops with 14 industry participants were conducted in Poland, one industry workshop with 8 participants was conducted in Spain and two workshops with 9 participants in total were conducted in the UK. Workshop participants in all countries were employees or representatives of various actors from the food supply chain (i.e. food processors and manufacturers, industry advisors, media, policy making and regulatory bodies, and industry representatives) and all participants held senior roles in their respective organisation. In addition to this, a total of 25 **interviews** were conducted across the 6 countries. More specifically, 3 industry interviews were conducted in Finland, 3 industry interviews were conducted in Israel, 5 industry interviews were conducted in Italy, 4 industry interviews were conducted in Poland, 3 industry interviews were conducted in Spain, and 7 industry interviews were conducted in the UK. Participants of these interviews included representatives from food organisations, media, and national food authorities.

In the next section, first the findings of each method of data collection will be compared and contrasted and the gap analysis will be presented and then the implications of this gap analysis for future EIT projects and industry initiatives will be discussed.

# High-level gap analysis

| Categories | Consumer<br>Focus group finding | Industry<br>Workshop finding | Industry<br>Interview finding | Consumer<br>Delphi survey finding | GAP ANALYSIS |
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| **Perceived trust in supply chain actors (farmers, manufacturers, retailers, governmental bodies)** | The most trusted actors in the food supply chain are **farmers.** Consumers trust farmers on the basis that farmers are the local actors and also the weakest and the most hardworking actors in the supply chain. When distrust in farmers is reported, it is often related to animal welfare.<br><br>Consumers' trust in **food manufacturers and food processors** is inconsistent across countries. Food manufacturers are the least trusted in the UK and Finland. Distrust in manufacturers and processors in these countries is linked to prioritisation of profit making and corner-cutting by these actors. This is also the case in Poland. However, in Poland, traditional food processors and well-known brands are trusted. In Spain and Israel, food processors were considered relatively trustworthy due to outside pressures. In Italy, local food processors enjoy the highest level of trust. | Industry experts in **Italy** and **Israel** suggest that in these countries consumers have higher levels of trust in farmers as farmers are seen as the most vulnerable actors in the supply chain. Practitioners in **Israel** also suggested that small companies and manufacturers are trusted by consumers as regulations place demand for transparency on food manufacturers. In **Israel,** consumers have less trust in retailers as they believe that retailers are trying to convince them to consume more and buy unnecessary products. Some industry experts in **the UK** believe that large organisations and well-known brands, as well as retailers' brands are more trusted by consumers However, a number of **UK** industry experts believe that smaller companies are more trusted by consumers because of their familiarity and locality. UK consumers are believed to trust and buy familiar brands and they expect familiar brands to continue to consistently taste the same and maintain their quality, especially | Industry generally consider trust in the context of their initiatives and their perception of whether these initiatives have been useful in increasing consumer trust in their own organisation. Consumer trust is seen as a valuable factor that can be influenced to some extent by industry activity. For example, manufacturers and media experts in **the UK** believed that their activities and initiatives are useful in building consumer trust. Food manufacturers, however, mentioned that trust is not the centrepiece of their initiatives and is something that is derived as a by-product of their campaigns and communications. Respondents from governmental bodies highlighted that rather than informed-trust, consumers have blind-faith in food and food organisations, as food systems may be too complex | The overall results of the Delphi survey demonstrate that **farmers** are **the most trusted** actors in the food supply chain (consumer trust in farmers is highest in Spain and lowest in Italy with Finland, UK, Israel, and Poland falling in between on a descending order).<br><br>**Food authorities** are the **least trusted** actors in the food supply chain. Trust in national authorities is the highest in Finland and the lowest in Poland with the UK, Italy, Israel, and Spain in between on a descending order.<br><br>The overall trust in **retailers** is lower than trust in farmers and higher than trust in manufacturers and food authorities. Consumer trust in retailers is the highest in Finland and the lowest in Israel with Spain, UK, Italy and Poland in between on a | According to the data collected from consumers and industry experts, farmers are the most trusted actors in the supply chain in all countries. However, issues around sustainability and animal welfare can damage trust consumer in farmers. Except for trust in farmers, trust in other supply chain actors varies from one country to another. The Delphi survey demonstrates that food authorities are the least trusted actors in the supply chain. This is in contradiction with certain focus group country findings in Spain, Finland and the UK, which report high levels of consumer trust in food authorities.<br>According to the Delphi survey findings, food manufacturers are less trusted than farmers and retailers, however they are more trusted than authorities. While focus group findings demonstrate that food manufacturers have the least consumer trust in Finland, the Delphi survey findings reveal that trust in manufacturers is in fact the highest in Finland. In addition, |

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| | Consumer trust in **retailers** is the least in Spain and Israel. Lack of trust in retailers in these countries is linked to priority of profit making and power of retailers respectively. In Italy, Poland, Finland, and UK, retailers are more trusted than food processors. Direct personal experience with the retailer plays an important role in higher level of consumer trust.<br><br>Trust in **food authorities** varies greatly from one country to another. Consumers have high levels of trust in food authorities in Spain and Finland. Trust in food authorities is ambivalent in Italy and Poland and a number of participants from these countries mentioned that they distrust authorities. In the UK, authorities were generally assumed to do their best and consumers believed that failings are due to lack of resources and knowledge to enforce regulations. | when it comes to brands that have been around for a long time. Industry experts in **Finland** emphasise that well-known brands with a good reputation are more trusted by consumers while large organisations are perceived to be less trusted. Experts in **Italy** argue that consumers' lack of trust in the food supply chain may be driven by a general lack of trust in politics and politicians as well as consumers' general disaffection from institutes that are believed to be far removed from people and their everyday problems. However, practitioners in **the UK** argue that UK consumers generally trust regulators as the regulations are on the right track to assure food safety and quality. Participants argued that visible regulation builds trust. However, it also demonstrates that a global crisis like the COVID-19 pandemic reveals that governments cannot guarantee the health and safety of individuals. Consumers' level of trust in various supply chain actors have not been discussed in **Spain**'s report. Industry experts in **Finland** argue that the country enjoys political/social stability and low levels of corruption and consumers perceive food control authorities to be both competent and trustworthy. | to understand and verify for consumers.<br><br><u>Note</u>: From a cross-country perspective, assertions in this section should be treated as 'emerging findings', because sample sizes are small, and richness of data varies from country to country. | descending order.<br><br>The overall trust in **food manufacturers** is lower than the overall trust in farmers and retailers and higher than the overall trust in food authorities. Finland enjoys the highest level of consumer trust in food manufacturers and Poland experiences the lowest level of consumer trust in food manufacturers. The UK, Italy, Israel and Spain are in between on a descending order. | workshop findings suggest that manufacturers and large food organisations with good reputation and familiar brands and then smaller food organisations, which enjoy high familiarity and locality, are trusted by consumers.<br>Consumer trust in retailers is less than consumer trust in farmers across the countries. Focus group findings are in line with Delphi survey findings in relation to lack of trust in retailers in Israel. However, focus group findings diverge from Delphi survey findings in regard to consumer trust in retailers in Spain. Based on focus group findings and industry interviews, consumer trust in supply chain actors appears to be based on blind faith and consumers need for trust rather than an informed trust shaped by information and education. |
| **Perceptions of food safety, food quality (and its ingredients)** | **Quality of food** and its ingredients was the most important factor to participants of focus groups in all counties. Consumers regarded quality as the basis of a lasting | In the industry workshops across countries, **quality, safety, and authenticity** of ingredients and products were highlighted as important factors in building trust | Food safety and food quality were highlighted as **important concerns** in the context of consumer trust by industry (Finland, Israel, Poland, Italy | Food quality and food safety **are not among the key issues** in building trust with supply chain actors. However, improving in-store hygiene | Industry workshop findings demonstrate that the baseline of quality, safety, and health already exists in developed countries and European markets. This is evident in |

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| **and its impact on consumer trust** | relationship with food suppliers. Quality and safety are the baseline of repurchase, loyalty, and hence, trust. | with consumers. Workshop participants mentioned that quality can also have an impact on corporate reputation and that the meaning of quality can vary from one market to another. Additionally, workshop participants talked about the importance of consistency in the context of quality, arguing that having a consistently high quality has a positive impact on how consumers build trust with food suppliers and the food supply chain. | and the UK), media (Finland and Italy), and national authorities (Finland, Israel, and the UK) interviewees. | practices is the 1st key issue in building trust with retailers in Israel and the 3rd key issue in building trust with retailers for consumers in Italy. | the overall findings of the Delphi survey. While in focus groups and industry interviews consumers and industry experts talk about the importance of quality and safety, food quality and food safety do not appear to be among the first 4 key issues in building trust with supply chain actors across countries. Concurrently, the COVID-19 crisis may have raised some issue in regard to in-store hygiene practices of retailers in Israel and Italy. |
| **Perceptions of transparency and its link to consumer trust** | Transparency was discussed in the context of visits to production sites or videos about the production processes. The need for higher transparency and its impact on trust is linked to consumers' **lack of trust** in manufacturer, their **lack of knowledge** about production processes and therefore, their need for first-hand experience of production processes and production sites. Participants also acknowledged that media's focus on negative stories rather than on what is going right in the day-to-day life of a food company is damaging trust in the context of transparency. | Transparency was discussed in industry workshops in all countries. The importance of **honesty and openness**, and the willingness to take part in difficult conversations about transparency were highlighted in workshops. Food industry transparency was discussed in the context of simple, verifiable communication and information sharing about food production and the food system. | Transparency has been highlighted as **an important issue** in the context of consumer trust by interviewees from industry (in Finland, Israel, Italy, Poland, Spain and the UK), media (Israel) and national food authorities (Israel, Spain and the UK). | **Transparency** in pricing is the 2nd key issue in building trust with retailers for consumers across countries. **Honesty** about products is the 2nd key issue in building trust with caterers and restaurants. While transparency is not discussed in the overall report, it is the 1st most important issue in building trust with manufacturers in Italy, Spain and Israel, and 2nd most important issue in building trust with manufacturers in Finland and the UK. | The need for higher transparency of food manufacturers and processors have been highlighted in focus groups, workshops, industry interviews as well as the Delphi survey in all countries. Transparency has been mentioned in smaller, more consumable parts in the Delphi survey (e.g. honesty about products for restaurants, transparency in pricing for retailers and higher overall transparency of manufacturers). |
| **Perceptions of locality and its link to consumer trust** | Participants of focus groups across countries reported that they trust local and national products and suppliers more than foreign suppliers. **Local products** are perceived to be fresher and local producers more trustworthy. Further, in Poland and the UK, focus group participants | In a number of industry workshops, the importance of **locality** was highlighted in the context of what food organisations can give back to local communities, in a food supply chain that is global in nature. Industry experts argued that food organisations should give back to the local community, for example by | Locality and concern for small traditional businesses and their impact on consumer trust was highlighted in an industry interview in **Italy**. | **Provision of local produce** is the first key issue in building trust with retailers for consumers in all countries. The use of local produce is the 3rd key issue in building trust with caterers and restaurants across countries. | The importance of locality and a more local supply chain is evident in the findings of focus groups, industry workshops, and the Delphi survey. The expectation from trusted retailers to source produce from local producers, reveals the importance of locality of those the retailers collaborate with (i.e. other |

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| | recommended farmers to create local distribution networks. In Italy, participants highlighted the role of consumers in striving for buy local products. | hiring local people. | | | actors of the supply chain). Further to this, as evident in industry workshops, the relationship of multinational and global food companies with local communities in form of support and giving back to the community have an impact on consumer trust. |
| **Perceptions of traceability and its link to consumer trust** | Focus group participants across the countries talked about the need for the food supply chain to go beyond individual production site and aim for **full traceability** of products, i.e. provide information about the whole supply chain. Higher traceability is associated with higher levels of trust. | Traceability was mentioned as one of the food industry's current and future **traceability initiatives** by industry experts. This includes increasing the quality of products through traceability, as well as working directly with producers to improve traceability. | Traceability was mentioned as a concern in the context of consumer trust during interviews with national authorities in **Finland** and **Poland.** | Enabling traceability of food products is the **first key issue** for consumers in all countries in building trust with farmers. For consumers across countries, food manufacturers' provision of traceability for their products is the first key issue in building trust with them. Further, providing traceability for products is the 4th key issue for consumers across countries in building trust with food retailers. Provision of traceability for their food is the 4th key issue for consumers in all countries in building trust with caterers and restaurants. | Traceability across the supply chain is highlighted as an important initiative in building trust with consumers in findings of focus groups, industry workshops, industry interviews and the Delphi survey. The findings of reports reveal that all actors across the supply chain are expected to play a role in realisation of traceability initiatives (e.g. farmers as enablers of traceability, manufacturers and retailers as executers of traceability). Consumers go as far as requesting farm-specific on top of country-specific traceability. |
| **Perceptions of communication and information sharing (education, raising awareness, labelling) and its impact on trust** | **Labelling and openness** about ingredients and production processes were frequently mentioned by focus group participants across countries. Focus group participants talked about what information should be included on labels (including an exact list of ingredients), definition of production systems (e.g. free-range), healthiness of the food and origin of food. Limitation of how | Communication, information sharing, and the role of media were highlighted in industry workshops. Practitioners argue that industry's communication with consumers should be **simple and direct**. Further, the role of media in shaping consumer attitude was highlighted by practitioners. Industry experts argue that positive media and social media coverage of industry activities can have a positive impact on trust. | The importance of communication and information sharing and its impact on consumer trust **has been emphasised in interviews** with industry experts (Poland, Spain and the UK), media experts (Italy, Poland, and Spain), and national authorities (Spain). UK industry interviewees also highlighted the importance of | Providing honest and accurate labelling for products is the **2nd key issue** for consumers across countries in building trust with food manufacturers. | There is a consensus across findings regarding more effective and honest communication (both through labelling and product information as well as media and social media channels for consumer education purposes). The focus group findings reveal that consumers are willing to play a role in co-creation of dialogue with food organisations. Industry experts believe that any meaningful change will only be possible through |

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| | much information can be included on labels were recognised by some focus group participants and **QR codes** or reference to a website were also mentioned in focus groups. Focus groups also discussed the type of communication that the supply chain had to engage in with consumers. **More dialogue**, possibly over social media, was suggested instead of one-way company communications. Other suggestions were for food chain actors to really listen to consumers and take account of consumer views in their decisions. Participants highlighted their willingness for **co-creation** in terms of information sharing, education, and raising awareness and acknowledged that they have a role to seek information proactively. | Effective communication and information sharing were associated with higher levels of consumer trust. Industry experts also highlighted the challenge of changing consumer attitude and behaviour as well as the importance of consumer education in relation to food products and production processes. Industry experts argue that consumers with more knowledge about the food industry could perhaps understand the sector and its complexities better and therefore, levels of trust could be higher. | the **integrity of communication**. | | shared responsibility and co-creation. Further, from the industry perspective, changing attitude and raising awareness per se are not enough if they do not go hand in hand with behaviour change. |
| **Perceptions of marketing practices and how it impacts consumer trust** | In Spain, UK, and Finland, focus group participants elaborated on the impact of **misleading marketing communications** on trust. They argued that new products find their way into consumer lives because of marketing and not out of necessity. Participants suggested that intentionally misleading package marketing, perceived as "health washing" or "**greenwashing**", gives unfounded impressions of healthiness and environmental sustainability of the product and its manufacturing process. | Industry workshops demonstrate that dishonest and manipulative marketing and advertising practices of food organisations can have a negative impact on consumers' perception and trust. Practitioners argue that trust can be damaged when **sustainability and CSR activities are used as marketing tools**. | Concerns about the impact of **misleading marketing practices** on consumer trust has been highlighted in interviews with media experts (Poland) and national authorities (the UK). | Use of honest marketing practices is the **3rd key issue** for consumers across countries in building trust with retailers. | Findings of focus groups, industry workshops and interviews and the Delphi survey demonstrate that consumer perception of marketing practices, especially retailers' marketing practices have an impact on their trust. Consumers and industry practitioners alike argue that marketing practices should not take advantage of societal demand for healthier, greener, and more sustainable products to increase sales and profit. |

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| **Perceptions of crisis/scandal management and how it impacts trust** | The way food organisations manage scandals was associated with consumer trust in a number of countries (e.g. UK and Finland). Further, for participants in Finland, the **country origin of the scandal** (e.g. Brazilian meat, Chinese food products) appears to play a role in its gravity and hence impact on consumer. Further, Finnish participants also suggested that in the case of some larger food scandal or crisis in food system, consumers might not be able to evaluate the situation properly.<br>In regard to food organisations response to crisis (e.g. the ongoing COVID-19 pandemic), with the exception of Israel, participants generally stated that although the restriction due to the pandemic had a large impact on their shopping behaviour, **it did not affect their trust** in the food supply chain. In the UK, Italy and Poland some participants said that their trust in and appreciation of the food supply chain had increased. In Israel, The COVID-19 outbreak had a negative impact on trust in retailers and authorities and a positive impact on trust in farmers and manufacturers. | Industry experts suggest that that organisations' approach to scandals and crisis can influence their perceived trustworthiness. Industry practitioners argue that organisations should take a **proactive approach** in times of crisis (e.g. COVID-19). The cruciality of identifying the issues/scandals that have a long-term impact on consumer trust (e.g. horsemeat scandal in the UK) was also discussed in industry workshops. Industry practitioners also highlighted that food organisations' approach to crisis and crisis-handling and their willingness to solve problems together with other stakeholders (e.g. consumers) affects the level of consumer trust. | N/A | N/A | The impact of crisis and scandals on consumer trust are only discussed in focus groups and industry workshops. These findings reveal that certain scandals and scandals originating from certain geographical locations, have a more long-lasting impact on consumer trust and food organisations need to take a proactive approach in identifying these incidents.<br><br>The findings of focus groups and workshops reveal that food organisations' reaction to a crisis (e.g. the COVID-19 pandemic) can have a positive impact on consumer trust, given that food organisations show timely and effective response to the crisis. |
| **Perceptions of sustainability and how it impacts trust** | Focus group participants across the countries emphasised the importance of **improving production processes** to achieve a more ethical and sustainable food system. The impact of the food supply chain on environment and | Sustainability practices of food organisations as well as their **social contributions** are highlighted as important contributors of consumer trust in industry workshops across countries. Participants of industry workshops argued that consumers | Sustainability issues (animal welfare, environment, ethicality, CSR) have been highlighted as **impactful issues** in the context of consumer trust by industry interviewees (the UK), media interviewees | Having high levels of animal welfare is the **1$^{st}$ key issue** in building trust with farmers. Support for environment is the 4$^{th}$ key issue for consumers in building trust with farmers. Waste reduction is the 4$^{th}$ key | The importance and cruciality of sustainability (e.g. animal welfare, protecting and supporting environment, CSR, and waste reduction) has been equally emphasised in focus groups, industry workshops, industry |

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| | animal welfare were also noted in other parts of the focus groups in a number of countries. Further, packaging emerged as a particularly concerning area for focus group participants. | are becoming more aware and more demanding about the environmental implication of food industry activities, especially in relation to animal welfare and CSR. Industry experts argued that climate change urgency has an impact on consumer's perception of food producers and therefore, their trust in the food supply chain actors. Industry experts argued that consumer priorities and demands varies according to the characteristics and nature of the market and consumers' priorities in the UK may be different from consumers' priorities in an African market. | (Finland), and national authorities (Israel). | issue for UK consumers in building trust with retailers. | interviews, and the Delphi survey. Each actor in the supply chain is expected to act accordingly (e.g. farmers to focus on animal welfare, manufacturers to focus on environment and CSR, retailers to focus on waste reduction, and authorities to assure compliance and provide aid and support to other actors). |

There is a consensus across all countries and groups on the following topics:

- Transparency programmes can improve consumer trust.
- Traceability across the supply chain is an important initiative in building trust with consumers.
- Sustainability initiatives can improve consumer trust.
- Farmers are the most trusted actors of the food supply chain

There is divergence on the following topics:

- Levels of trust in food authorities.
- Locality, reshoring and their impact on consumer trust.
- Communication: Should it be two-way or one-way? Are consumers really interested in communicating with food chain actors? Will food chain actors really listen to consumers?

# Implications for future EIT projects and implications for industry

| Categories | GAP ANALYSIS<br>(Summary of key points) | Implications for future research (e.g. EIT funded work within this grand challenge in years to come) | Implications for industry actions to improve consumer trust (e.g. which type of activities may be beneficial, what type of communication campaign) |
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| **Perceived trust in supply chain actors (farmers, manufacturers, retailers, governmental bodies)** | According to the data collected from consumers and industry experts, farmers are the most trusted actors in the supply chain in all countries. However, issues around sustainability and animal welfare can damage trust consumer in farmers.<br>Except for trust in farmers, trust in other supply chain actors varies from one country to another. The Delphi survey demonstrates that food authorities are the least trusted actors in the supply chain. This is in contradiction with certain focus group country findings in Spain, Finland and the UK, which report high levels of consumer trust in food authorities.<br>According to the Delphi survey findings, food manufacturers are less trusted than farmers and retailers, however more trusted than authorities.<br>While focus group findings demonstrate that food manufacturers have the least consumer trust in Finland, the Delphi survey findings reveal that trust in manufacturers is in fact the highest in Finland. In addition, workshop findings suggest that manufacturers and large food organisations with good reputation and familiar brands and then smaller food organisations, which enjoy high familiarity and locality, are trusted by consumers.<br>Consumer trust in retailers is less than consumer trust in farmers across the countries. Focus group findings are in line with Delphi survey findings in relation to lack of trust in retailers in Israel. However, focus group | To conduct further research to provide better understanding of the contradiction between the findings of focus groups and the Delphi survey in regard to consumer trust in food authorities in Spain, Finland and the UK.<br><br>To conduct further research to understand the cultural drivers of trust and/or distrust in food supply chain actors in each country.<br><br>To provide a better understanding of what trust means to consumers in each country and what consumer trust is to the food supply chain in each country and then bridging this gap through communication campaigns to reach a mutual understanding and a mutual definition.<br><br>To determine how much of the food supply chain activities and initiatives are aimed at building trust with their stakeholders, and understand whether consumer trust is a primary goal or a by-product for food organisations | To develop campaigns that help consumers build informed trust with supply chain actors based on education and information.<br><br>To develop campaigns that explain the roles and activities of governmental bodies and authorities to consumers.<br><br>To explore examples of positive trust building activities (e.g. possibly with food manufacturers in Finland) and understand the reasons for their success in having high consumer trust.<br><br>To work on increasing consumer trust in food manufacturers and retailers through transparency programmes.<br><br>Further collaboration of food manufacturers and retailers with government authorities to improve consumers' perception of these actors.<br><br>Further collaboration with key media people to communicate what food actors are doing right and getting right (positive media coverage). |

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| | findings diverge from Delphi survey findings regarding consumer trust in retailers in Spain.<br>Based on focus group findings and industry interviews, consumer trust in supply chain actors appears to be based on blind faith and consumers need for trust rather than an informed trust shaped by information and education. | | |
| **Perceptions of food safety, food quality (and its ingredients) and its impact on consumer trust** | Industry workshop findings demonstrate that the baseline of quality, safety, and health already exists in developed countries and European markets. This is evident in the overall findings of the Delphi survey. While in focus groups and industry interviews consumers and industry experts talk about the importance of quality and safety, food quality and food safety do not appear to be among the first 4 key issues in building trust with supply chain actors across countries. Concurrently, the COVID-19 crisis may have raised some issues regarding in-store hygiene practices of retailers in Israel and Italy. | To conduct further research to understand consumers' safety and quality concerns.<br><br>To determine the role of culture and cultural norms in quality and safety, even in countries that have already met the baseline of quality and safety. | To aim for a cross-country standard definition of food safety and food quality.<br><br>To mitigate consumers' concerns about in-store hygiene by explaining the health protocols in place.<br><br>To better understand consumers' safety concerns in the time of COVID and addressing these concerns by the right course of action.<br><br>To collaborate with food safety authorities to provide information and reassurance to consumers during a global crisis. |
| **Perceptions of transparency and its link to consumer trust** | The need for higher transparency of food manufacturers and processors has been highlighted in focus groups, workshops, industry interviews as well as the Delphi survey in all countries. The need for transparency in smaller more consumable parts has been mentioned in the Delphi survey (e.g. honesty about products for restaurants, transparency in pricing for retailers and higher overall transparency of manufacturers). | To investigate organisational and industry barriers of radical transparency to understand what stands in the way of transparency.<br><br>To investigate the negative and positive consequences of radical transparency programmes<br><br>To determine what food industry and its actors can learn from other industries and previous case studies.<br><br>To measure the impact of radical transparency on consumer trust.<br><br>To identify what the risks are and where the risks are with transparency programmes, who is affected by them, and then to find solutions to mitigate those risks. | To break down transparency programmes into smaller, more manageable and consumable blocks/initiatives (e.g. production line transparency, marketing practices transparency, pricing transparency etc) and delegating each transparency block to the appropriate actor (e.g. pricing transparency and marketing transparency to retailers, production transparency to manufacturers).<br><br>To find solutions for inter-organisation and intra-organisation consistency in transparency programmes.<br><br>To keep an ongoing dialogue with consumers and receive feedback from consumers to assure transparency programmes are delivering what consumers need and want from the supply chain. |
| **Perceptions of locality and its link to consumer trust** | The importance of locality and a more local supply chain is evident in the findings of focus groups, industry workshops, and the Delphi survey. The expectation from trusted retailers to source produce | To investigate the right balance between local-global actor for international and/or multinational organisations.<br><br>To understand consumers' reactions to having local and | To create partnerships with local communities and making a difference in the quality of life of local communities.<br><br>To leverage local communities' cultural knowledge and |

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| | from local producers reveals the importance of locality of those the retailers collaborate with (i.e. other actors of the supply chain). Further to this, as evident in industry workshops, the relationship of multinational and global food companies with local communities in form of supporting and giving back to the community have an impact on consumer trust. | in-season produce in retail stores after having imported and supplied out-of-season produce from faraway countries all year long for an extended period of time (to investigate the impact of localising the supply chain on consumer trust and satisfaction).<br><br>To understand why the local-global balance has not been mentioned as a key issue by food authorities.<br><br>To investigate the risks and/or advantages of reshoring and localising the supply chain in the times of a global crisis (e.g. the COVID-19 pandemic).<br><br>To investigate why locality is of higher importance in certain cultures and/or countries. | experience to deliver higher value to consumers.<br><br>To start a dialogue with local communities so that they can understand the purpose and values of their business.<br><br>To listen to local communities to understand how the business can be of benefit and use for local people.<br><br>To listen to local communities to understand what local communities' concerns are and how the organisation can address them through communication and collaboration.<br><br>To determine how the business can support the local producers of the supply chain. |
| **Perceptions of traceability and its link to consumer trust** | Traceability across the supply chain is highlighted as an important initiative in building trust with consumers in the findings of focus groups, industry workshops, industry interviews and the Delphi survey. The findings of reports reveal that all actors across the supply chain are expected to play a role in realisation of traceability initiatives (e.g. farmers as enablers of traceability, manufacturers and retailers as executers of traceability). | To determine the feasibility of traceability initiatives for a supply chain that is complex and global in nature.<br><br>To understand the barriers in the face of traceability initiatives, and how to overcome them.<br><br>To measure the impact of traceability initiatives on consumer trust. | To learn from the experience of other industries, which have traceability in their agenda (e.g. fashion industry) and to take the lessons learnt by these industries into account to avoid repeating mistakes.<br><br>To determine the potential use of blockchain technology in traceability initiatives.<br><br>To work with start-ups that have food supply chain traceability in their agenda. |
| **Perceptions of communication and information sharing (education, raising awareness, labelling) and its impact on trust** | There is a consensus across findings in regard to more effective and honest communication (both through labelling and product information as well as media and social media channels for consumer education purposes). The focus group findings reveal that consumers are willing to play a role in co-creation of dialogue with food organisations. | To investigate how the science of behaviour change can be of use in bridging the attitude-behaviour gap for consumers.<br><br>To conduct further research to understand which type of communication and which campaigns are more effective in bringing about meaningful change.<br><br>To investigate the roles that consumers can play in delivering more effective consumer education/campaigns aimed at increasing consumer trust.<br><br>To evaluate the effectiveness of each campaign and initiative in this regard through scientific and controlled experiments as well as fieldwork. | To determine how to include all the relevant information to labels in a way that it does not overcrowd the labels and keep labels simple and easy to understand.<br><br>To put consumer well-being at the centre of all their communication and campaigns.<br><br>To explain consumers' role in communication and information sharing initiatives to them and to facilitate consumer education in the process through an ongoing dialogue.<br><br>To determine the role of each supply chain actors (e.g. food authorities) in communication and information sharing and how to leverage their platform to start a |

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| | | | conversation with consumers.<br><br>To determine how to get consumers involved and how to best communicate their role in the co-creation process to them.<br><br>To work with media and assure that supply chain successes and achievement are also voiced and reflected in the news.<br><br>To determine how to best make use of social media for communication campaigns. |
| Perceptions of marketing practices and how it impacts consumer trust | Findings of focus groups, industry workshops and interviews and the Delphi survey demonstrate that consumer perception of marketing practices, especially retailers' marketing practices have an impact on their trust. Consumers and industry practitioners alike argue that marketing practices should not take advantage of societal demand for healthier, greener, and more sustainable products to increase sales and profit. | To understand what honest and acceptable advertising means to consumers.<br><br>To investigate what consumers want to see in food companies' advertising and marketing efforts.<br><br>To determine the right balance among driving sales, raising awareness, and assuring honesty in marketing and advertising activities of food organisations. | To incorporate marketing activities as a building block in transparency programmes.<br><br>To learn from the food industry's or other industries' best marketing/advertising practices. |
| Perceptions of crisis/scandal management and how it impacts trust | The impact of crisis and scandals on consumer trust are only discussed in focus groups and industry workshops. These findings reveal that certain scandals and scandals originating from certain geographical locations, have a more long-lasting impact on consumer trust and food organisations need to take a proactive approach in identifying these incidents. The findings of focus groups and workshops reveal that food organisations' reaction to a crisis (e.g. the COVID-19 pandemic) can have a positive impact on consumer trust, given that food organisations show timely and effective response to the crisis. | To investigate which types of issues impact consumer trust for a shorter period of time and which types of issues are considered as major incidents for consumers; and whether there are any cultural differences in redlines (which are not to be crossed) for consumers in different markets.<br><br>To investigate how to best communicate with consumers about a crisis insofar that the reputation of the organisation is not jeopardised.<br><br>To investigate how organisations can recover from large-scale major scandals and rebuild trust with consumers. | To determine how food organisations' and food supply chain's preparedness for a global crisis can be improved. |
| Perceptions of sustainability and how it impacts trust | The importance and cruciality of sustainability (e.g. animal welfare, protecting and supporting environment, CSR, and waste reduction) has been equally emphasised in focus groups, industry workshops, industry interviews, and the Delphi survey. Each actor in the supply chain is expected to act accordingly (e.g. farmers to focus on animal welfare, | To investigate barriers of sustainability.<br><br>To understand the cultural differences in perception and priority of sustainability in various markets.<br><br>To determine how sustainability initiatives can be implemented when a global consensus about their priority | To determine how sustainability initiatives can be broken down into smaller more manageable blocks with the little time left to avoid the consequences of climate change.<br><br>To develop a rating system for ethicality of manufacturers and food producers (similar to the hygiene ratings for restaurants). |

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| | manufacturers to focus on environmental impact of their activities and CSR, retailers to focus on waste reduction, and authorities to assure compliance and provide aid and support to other actors). | is lacking.<br><br>To develop education programmes that raise the next generation of consumers with higher sustainability literacy and therefore, demands for a more sustainable supply chain.<br><br>To determine who would be best suited to rate supply chain actors' ethicality.<br><br>To measure the impact of sustainability and sustainability initiatives on consumer trust. | To encourage organisations to give high priority to sustainability even in markets where it is not yet a priority. |

# How can the insights of the report inform the planned crowd ideation

- **Which gaps could possibly be filled through a communication campaign?**

**Perception of communication and information sharing** (education, raising awareness, labelling), its impact on trust as well **as perception of transparency** (and **perception of marketing activities** as a subcategory of transparency) and their link to consumer trust could be addressed through a communication campaign.

- **Which 1 or 2 potential industry actions (including communication campaigns) may benefit significantly from crowd ideation?**

*For actions related to perception of communication and information sharing:*

1. To determine how to include all the relevant information to labels in a way that it does not overcrowd the labels and keep labels simple and easy to understand.
2. To determine how to get consumers involved and how to best communicate their role in the co-creation process to them.
3. To determine how to best make use of social media for communication campaigns.

*For actions related to perception of sustainability:*

1. To determine how to develop a rating system for ethicality of manufacturers and food producers (similar to the hygiene ratings for restaurants).
2. To determine how sustainability initiatives can be broken down into smaller more manageable blocks with the little time left to avoid the consequences of climate change.

*For actions related to traceability:*

1. To determine how blockchain technology can be used in traceability initiatives and/or working with start-ups that have food supply chain traceability in their agenda/business plan

## Country-level gap analysis – Finland

This activity has received funding from EIT Food, the innovation community on Food of the European Institute of Innovation and Technology (EIT), a body of the EU, under the Horizon 2020, the EU Framework Programme for Research and Innovation

| Deliverable | |
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| Title: | Country-level gap analysis - **FINLAND** |
| Type of Deliverable | R: Document, report |
| Authors: | Bodo Steiner,<br><br>Kyösti Pennanen<br><br>Janne Laine |

# Executive Summary

Finland is – as a function of its location and size (5,5 Mio inhabitants) different compared to many other countries: the structure of food production and distribution channels is different compared to many other EU countries. In Finland, the Farmers Union is still a strong player in society with the help a political party which has always been in government. Finland has a duopoly system of grocery market chains, which sell approximately 85 percent of the food Finns eat, and Finland has 4 major food industry companies which produce approximately 75 percent of the food Finns eat. Nevertheless, the stakeholders in the Finnish food supply chain have – according to both scientific measures (food safety/ hygiene) and consumer perceptions been able to leverage their size and spatial proximity to the advantage of building trust most significantly into public food safety authorities. Consumers are very well aware of the oligopolistic market structures at retailing and processing levels, and this has led to some concerns regarding transparency (e.g. products mislabelled for their ingredients) but overall the Finnish food supply chain benefits from high levels of trust.

# Introduction

The basis for this report are 6 focus groups with 30 members of the general public, 1 industry workshop with 7 participants in total, 4 interviews with actors from the food industry, and a Delphi survey with XXX responses from Finland.

Overall, the focus groups had 18 female and 12male participants. 6 out of 18 female participants were in the 18-40 age group, 7 were in the 41-60 age group, and 5 were in the 61-70 age group. Further, 11 female participants were responsible for shopping in the household and 7 female participants were not responsible for shopping in their household. Moreover, 7 out of 12 male participants were in the 18-40 age group, 4 out of 12 werein the 41-60 age group, and 1 out of 12 was in the 61-70 age group. Further, 9 out of 12 male participants were responsible for shopping and 3 out of 12 of them were not responsible for shopping in their household. Each focus group lasted for about 2 hours.

In the industry workshop, 7 participants shared their views and experiences in the sessions. The participants were employees of: a large food processor and manufacturer, a food manufacturer specialized in high-quality meat products, a large retail group, an association representing Finnish bread industry, an industry federation widely representing the interests of the Finnish food and drink industry, an association that promotes the interests of grocery trade and foodservice wholesales, and an association that promotes Finnish food and food culture by providing information about food and the food production chain and administering a certificate for Finnish food products. The participants hold positions ranging from CEOs and CPO to R&D Manager and Health and Nutrition Manager.,

For industry interviews, 4 interviews were conducted by a member of the University of Helsinki. Interviews lasted up to one hour. Regarding sample characteristics, 1 interviewee was from the media industry, 2 of them were government authorities, 1 was the head of a food manufacturing association.

In the Delphi survey, from the 366 Finnish participants, 182 respondents (50.1%) identified as female and 181 (49.9%) as male

In the next sections, we will present the gap analysis for Finland.

# Country-level gap analysis

[Complete the table in relation to these categories, comparing findings from the focus groups, industry workshops and industry interviews. Please note: it may not be possible to fill all the boxes/categories, it will depend on the findings per country. Please adapt categories as required].

| Categories | Consumer<br>Focus group finding | Industry<br>Workshop finding | Industry<br>Interview finding | GAP ANALYSIS |
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| **Perceived trust in supply chain actors (farmers, manufacturers, retailers, governmental bodies)** | High level of trust towards all actors generally. Trustworthy food control authorities and a corruption-free society seen as a guarantee of trustworthy food supply. Some reservations concerning large food manufacturers, as these were seen to most strongly prioritize profit over everything else, leading to dishonest or unfair behaviour in some consumer views. | Emphasized tight networking and good cooperation between all supply chain actors as a strong basis for reliable food supply. Aware of the misgivings towards larger companies as a persistent psychological effect among consumers and their tendency to see smaller companies as more sympathetic; pragmatically this is something they have acknowledged, and to some degree accept as a given fact; this was, however, perceived as a biased and unfair view considering that large companies invest heavily in | national authority is well trusted by consumers for fact-based information; some reservations regarding high levels of industry concentration | see concluding section. |

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| | | quality control, which should objectively make them more trustworthy. | | |
| **Perceptions of food safety, food quality (and its ingredients) and its impact on consumer trust** | Food safety is not seen as real concern in everyday life, effective food authorities are seen to guarantee that anything found in Finnish stores is safe to eat. The very rare issues seen as a proof that the food control system is working. Trust into food quality is often built through personal experiences with products and brands over time. | The food supply chain takes great pride in the high levels of food safety in Finland, achieved through careful quality control systems of companies and open cooperation with other actors and authorities. Competent self-monitoring in the Finnish food industry to minimize chemical and microbiological risks. Workshop participants also emphasized strong brands with good reputations based on high quality products. | as national authority is highly trusted and manages effectively, food safety concerns are practically non-existent; Legal procedures in Finland have become more stringent since the Horsemeat scandal; very rare issues of food safety and quality, and quick response of industry actors on past food safety matters has increased trust | |
| **Perceptions of transparency and its link to consumer trust** | Consider transparency a central factor in trust. Some frustrations that seemingly complex food supply chains make it difficult to know what is really in the product or where and how its ingredients have been produced. | Workshop participants were aware of and emphasized the central role of transparency in consumer trust. Plans to keep investing in cooperation with partners, reliable communications, and technological systems (e.g. data, logistics) to further improve transparency. | High transparency across the food supply chain in spite of high industry concentration; this generates however a supply-push that could lower trust in the future | |

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| **Perceptions of locality and its link to consumer trust** | Locality is a central factor in perceived trust. Some favour domestic food for its perceived higher quality. Some favour short food supply chains, as they are less complex and more transparent. | Emphasize the quality of Finnish food, and the fact that consumers appreciate it. | we observe an increase in demand for shorter value chains that are due to this characteristic even more transparent and likely have greater demand for local foods | |
| **Perceptions of traceability and its link to consumer trust** | Traceability is seen important especially in some product groups (e.g. meat, fish). Some reservations concerning what some perceive as misleading origin labels. | Recognize the central role of traceability together with transparency. Plans to keep investing in and implementing new technologies (e.g. in data, logistics) to further improve traceability. | currently high levels of transparency and traceability exist | |
| **Perceptions of communication and information sharing (education, raising awareness, labelling) and its impact on trust** | Trust-related information is obtained from word-of-mouth information like experiences and recommendations of friends and acquaintances, from discussion and material published in social media channels, as well as news and documentaries conventional media.<br><br>While consumers have some misgivings about the effects of social media, in focus | Long-term efforts to produce and disseminate reliable information on food production, and to leverage it in new ways. Well-known domestic food origin labels seen as significant in building and maintaining trust.<br><br>Sensation-seeking media emphasizing scandals and bad news related to food industry, overshadowing seemingly mundane everyday work for reliable and | social media does pose a new challenge through fake news; very good collaboration among stakeholders along the food value chain due to proximity/ small number of actors | |

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| | groups they reported it more as an opportunity to build trust.<br><br>Views that information related to specific food products (e.g. ingredients, production processes) as well as educational material concerning food production should be made better available in accessible and engaging formats.<br><br>Country of origin labels are important to many participants, but concern and irritation that their meaning is not always clear (i.e. Finnish flag in a product packaging does not mean 100 % Finnish product). | trustworthy food supply.<br><br>The unpredictability of the young generation of future consumers, with rapidly arising trends and fragmented segments in the world of numerous kinds of social media influencers and mobile platforms is a challenge for maintaining trust in food industry.<br><br>Numerous digital platforms with varying content in communication makes it difficult for consumers to find information that they feel they can trust. | | |
| **Perceptions of marketing practices and how it impacts consumer trust** | Appreciate open and honest communications.<br><br>However, the marketing was not always perceived as transparent, which caused some irritation. Wariness of seemingly trendy products and associated marketing | Saddened by the consumer scepticism towards food-related information disseminated by (large) food companies, dismissal of it as "marketing propaganda", while sincerely working to provide reliable and useful information e.g. on the | Openness, truth, responsibility are important to Finnish consumers. | |

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| | messages, with the perceived intention of selling the product with images and words that were not in line with the actual product content. | nutritional and health aspects of food. | | |
| **Perceptions of crisis/scandal management and how it impacts trust** | Typically, violations of food regulations and especially larger food scandals reported in news, provoked periods (typically only short ones) of paying closer attention to trust in food. In Finland food frauds were seen as very rare, almost non-existent by some participants, but in some countries a serious problem. The news of harmful substances found in food and resulting recalls in Finland were commonly seen as rather rare individual cases, and also as proofs that food control in Finland is working, as in all of these cases the contaminated food product batches had been caught at the border, or were pulled from shops before | The industry representatives thought that the experience of COVID-19, and the intense and successful cooperation to guarantee food supply, had even strengthened the Finnish food supply chain, and increased its trustworthiness. | E.g. recalls and withdrawals (e.g. when contaminated foods had reached retail shelves) are in Finland considered to be measures that show responsibility. Consumers perceive recalls and withdrawals as a responsible act; Covid has likely increased trust as the food supply chain has worked under such strain in the mind of consumers | |

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| | being sold, so that no-one was known to be harmed.<br><br>Generally, the participants did not make direct associations between Covid-19 and their trust in food. Views predominate that the Finnish food system had handled well the first wave of the COVID-19 and the subsequent rise in demand of food. However, some participants considered that government health representatives / organizations in Finland had made mistakes in handling the epidemic situation, leading them to question whether their current trust in government food authorities is misguided. | | | |
| **Perceptions of sustainability and how it impacts trust** | In some views buying local goods was linked with sustainable consumption.<br><br>Some participants mentioned paying attention to organic food labels and certificates such as the MSC (Marine | Strengthening environmental concerns and increased urgency to combat climate change leads to unjustified views on mainstream food production among some journalists, influencers, and consumers. | short value chains (with more local actors) likely increase trust into the future | |

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| | Stewardship Council) logo for sustainable fishing. In the context of organic food labels, the variation in associated regulations in different countries were seen as a factor that decreased the trustworthiness of such labels. Some participants said they only acknowledge Finnish organic food labels, as they know the regulations governing organic food production in Finland.<br><br>Some irritation and weariness of "greenwashing", giving unfounded impressions of the environmental sustainability of the product and its manufacturing process | Sensationalist journalism sometimes intentionally misinterprets the environmental effects of the Finnish food industry. The view that the food industry is not doing enough overshadows many concrete actions that it has taken to make food production sustainable. | | |

- POSSIBLE INCLUSION OF COUNTRY CONSUMER DELPHI RESULTS SUMMARY TABLE AROUND HERE*-

*Possible Inclusion of Table of Results from the Consumer Deplhi Survey (yet to be completed by the EIT working group). These results will provide high-level (summary) quantitative data from consumers about some of the categories listed in the table above. E.g. % of consumers who have high, medium or low levels of trust in the supply chain; % of consumers who think transparency is an important issue driving trust, etc. A table will be provided by the Consumer Delphi Team, for each country, when it is available. It is intended as supplemtary data.

# Implications for future EIT projects and implications for industry

[As with the previous section table, please note you may not need to fill all the boxes/categories. Furthermore, some of the implications might simultaneously fill multiple gaps, please feel free to merge categories/amend as required].

| Categories | GAP ANALYSIS (Summary of key points) | Implications for future research (e.g. EIT funded work within this grand challenge in years to come) | Implications for industry actions to improve consumer trust (e.g. which type of activities may be beneficial, what type of communication campaign) |
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| Perceived trust in supply chain actors (farmers, manufacturers, retailers, governmental bodies) | - more interaction among all supply chain actors is high desired by all actors: all see scope for more co-creation with regard to new initiatives | - greater need to understand how direct interaction with consumers can be established (esp. young consumers) and how related initiatives (incl. interaction platforms) could be established | - demand for new interaction and co-creation activities with consumers (esp. young consumers) |
| Perceptions of food safety, food quality (and its ingredients) and its impact on consumer trust | | | |
| Perceptions of transparency and its link to consumer trust | | | |
| Perceptions of locality and its link to consumer trust | | | |

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| Perceptions of traceability and its link to consumer trust | | | |
| Perceptions of communication and information sharing (education, raising awareness, labelling) and its impact on trust | | | |
| Perceptions of marketing practices and how it impacts consumer trust | | | |
| Perceptions of crisis/scandal management and how it impacts trust | | | |
| Perceptions of sustainability and how it impacts trust | | | |

# How can the insights of the report inform the planned crowd ideation

- Which gaps could possibly be filled through a communication campaign?
  - There seems to be generally (from all sides – consumers and industry stakeholders) a mutual perception / understanding and thus indirectly agreement that trust in the food chain from a food safety perspective is not a major issue. However, one gap relates to the perception from industry stakeholders that industry concentration / lack of competition is not an issue, a perspective with which consumers disagree with.
- Which 1 or 2 potential industry actions (including communication campaigns) may benefit significantly from crowd ideation?
  - Two things are striking: first of all, Finnish consumers would seem to be sympathetic toward technology based solutions; second, consumers care especially about three things, it seems: food origin, authenticity and a general interest in more educational material. Taken these two findings together, it seems natural to suggest technology-based/ - focused communication campaigns, i.e. campaigns that convey how companies invest into / use novel technology-based solutions (digital labels, technology-based certification schemes that are quasi tamper-proof etc.) to address authenticity and regional origin, plus to convey unbiased educational material (e.g. from Universities and food safety authorities).

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## Country-level gap analysis – Spain

This activity has received funding from EIT Food, the innovation community on Food of the European Institute of Innovation and Technology (EIT), a body of the EU, under the Horizon 2020, the EU Framework Programme for Research and Innovation

| Deliverable | |
|---|---|
| Title: | Country-level gap analysis |
| Type of Deliverable | R: Document, report |
| Authors: | Teresa Fresno<br>Maria José Hernando<br>Mariana Silva<br>Laura Jaime<br>Sonia García<br>María Pérez |

# Country-level gap analysis

| Categories | Consumer<br>Focus group finding | Industry<br>Workshop finding | Industry<br>Interview finding | Consumer<br>Delphi survey finding | GAP ANALYSIS |
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| **Perceived trust in supply chain actors (farmers, manufacturers, retailers, governmental bodies)** | **High level of trust in the food chain**<br><br>Participants showed in general a high level of trust in the food chain, from the processing industry to the distributors, both local shops and superstores. They trust that the food we eat is safe.<br><br>100% trust in the work of **health authorities and institutions**<br><br>**Farmers and processors**, as the most trustable in the process and perceive the farmers to be the most vulnerable actors of the supply chain.<br><br>**Retailers** are the least trusted by the majority of the participants in Focus Groups | The food companies´ expertise is a source of trust for the consumer.<br><br>The participants believe consumer have a high level of trust in the food chain but it is necessary to increase the quality of the product through innovation projects, traceability, etc., to improve consumers´ trust.<br><br>Consumer ideas are very fickle and consumer trust can be lost very easily. | All the interviewees consider that consumer trust is key to keep the system running.<br>The interviewed industry representative considers that in general consumers base their trust in the food chain on what they receive from the media, since most of them do not exactly know the production methods.<br>The participant from the authority body stated that a lack of trust in the labelling and the authorities might lead consumers to make wrong choices that impact their health and the environment. | From a total of 365 participants from Spain, results of the Delphi survey suggest that consumers trust the most in farmers among all actors in the food supply chain. Food retailers, food service providers (e.g. restaurants and catering) and food manufacturers are trusted in a similar level but in this order, whilst government authorities are least trusted. | Consumer trust in the food chain but specialists from the industry think that consumers base their trust in media and it can be lost very easily.<br>According with industry representatives, the expertise is synonym of trust and it is necessary to improve the quality of the food.<br>However, in accordance with focus group trust is more close to safety.<br>People trust more on farmers and producers. Nevertheless, there is a GAP between focus group and Delphi survey since people trust less in retailers in the first case, with a high level of confidence in authorities, while in the second case consumers trust less on these authorities and they have a good image of retailers.<br>For the industry representative the trust in the labelling is also a point to deal with. |

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| | Farmers and processors, as the most trustable, since they have to comply with regulations and take greater risks. On the other hand, retailers were considered the least trustable because their activity is not under so much pressure.<br><br>The most important items associated with trust in food suppliers:<br><br>• Quality of food and its ingredients<br>• Fairness of prices<br>• Independent checks of food and food suppliers | | | | Transparency both in the production processes and in the information shown to the consumer, as well as the fact that its veracity is contrasted by some independent entity, could be key elements to increase trust. |
| **Perceptions of food safety, food quality (and its ingredients) and its impact on consumer trust** | The safety and quality of food and its ingredients were highlighted as important factors that affect trust by participants of the focus groups.<br><br>In terms of quality they generally trust more in the small and local shops rather than in superstores.<br><br>Traceability and the feeling that companies can guarantee food security<br><br>The quality of products are in general good<br><br>Trust and most of those were | In this area, the most important things to generate consumer trust are: quality, treatment and service.<br><br>A few years ago the problems for the consumers were focused mainly on the food quality, now the problems for the consumers are more social or environmental.<br><br>The food companies´ expertise.<br><br>The food companies should give to consumers elements they can trust, such as a | The participant from the media indicated that, even though consumers seek for clarity in the information related to food security and quality, results from the Eurobarometer raise that a high percentage of them find this information complicated.<br>The representative of the authority body added that the pandemic has stressed the importance of public health, including food safety.<br>The food industry representative considers that this sector needs to | N/A | In general, all of them think that it is necessary to improve transparency, clarity in labelling and traceability. People from the industry opine that the treatment is a remarkable factor in terms of trust but consumers do not mention it. They also think that quality was more important few years ago and now the environment highlights for consumers.<br>Consumers from the focus group also stated that small and local shop are more trustable.<br><br>The composition of food products, the use of additives and unnecessary or meaningless ingredients such as sugar, is a current source of significant |

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| | related with the transparency of food composition (ingredients), traceability and the feeling that companies can guarantee food security, trustable recommendations made by other customers and quality loss leads to loss of trust.<br><br>Really important good labelling when they have physical conditions such as allergies or diseases | quality product, a safe product, a healthy product, a tasty product. | promote what they do because in the vast majority of cases things are done well but this does not reach the consumer | | consumer distrust and doubts about their quality in terms of health. |
| **Perceptions of transparency and its link to consumer trust** | Participants think that sometimes the whole truth about the quality or origin of food is not told for retailers to obtain greater benefits.<br><br>Participants thinks that now all the food system is more transparent.<br><br>Honesty and integrity are associated with transparency. | Participants consider that trust is driven by transparency, the consumer has more and more options, so each consumer generates trust by seeking information himself.<br><br>Giving as much information as possible in a comprehensible form not open to interpretation about the processing, the product, the project… is fundamental.<br><br>The most important things to generate consumer trust are: clear labelling, transparency, coherence, consistency over time (in a large period), authenticity, quality, treatment, service, sustainability, convenience and ethic (social and | All interviewees pointed out that the perception of transparency by industry and regulatory bodies is key to trust in the food chain.<br>Participants from the authority body highlighted that lack of transparency may lead consumers to misunderstand certain information they receive and even base their trust in non-reliable sources.<br>For the food industry representative, transparency is important but might be overshadowed by how issues are presented in the media.<br>The participants from the authority body and the media encourage all stakeholders involved in | Transparency in pricing is considered by the Spanish consumers as one of the most important aspects to trust food retailers. Their trust on food manufacturers is also subject to transparency, since transparency itself and honesty in food production and labelling are considered as the most important actions for this sector to gain consumers´ confidence. | It is necessary more transparency despite consumers of Focus group think that now are more than few years ago. For the participants of the workshop a lot of information is not useful if it is not clear, coherent, and consistent in time. For the interview from the industry this transparency may be affected by media.<br>Participants from the focus group think that retailers sometimes are not transparent while Delphi survey revealed that pricing should be the key factor in transparency.<br><br>Social networks can have a significant impact on a company's perception of transparency.<br>It is therefore key to manage public information on products, from their composition to the consumer's assessment of them, and at the same time to ensure that this information is accurate. |

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| | | environmental sustainability). | the food chain to improve transparency. | | |
| **Perceptions of locality and its link to consumer trust** | Participants prefer to buy local products. In this way help the local economy and the shorter food chain was fresher and more trustworthy.<br><br>They also think that local products have better organoleptic characteristics and less environmental impact. | | Locality was not addressed during the interviews, so there were not specific comments on this. | Locality, as the use and retail of more domestic and local products, is considered by consumers as a main action to trust on retailers and food service providers (restaurants and caterings). | Both groups of focus group and Delphi survey coincide in preference for local products because they have more quality and they are sustainable<br><br>Both the proximity and the direct relationship with the supplier or with the least possible number of intermediaries can be key in the perception of trust. |
| **Perceptions of traceability and its link to consumer trust** | Participants associated increased traceability with higher trust. | It is necessary to improve Traceability (especially the food producers traceability). | Traceability was not addressed during the interviews, so there were not specific comments on this.<br>It can be interpreted from the conversation that all interviewees would include traceability as part of transparency. | Traceability has not been highlighted by consumers in Spain as one of the top actions to trust on the different actors of the food supply chain. However, honest labelling and honesty in food production, which could be related with traceability, is considered important for manufacturers and food service providers. | More traceability implies more trust. Therefore, participants in the industry workshop consider that it is necessary to improve it. |
| **Perceptions of communication and information sharing (education, raising awareness, labelling) and its impact on trust** | Good information on labels and packaging was associated with honesty and transparency.<br><br>Information accuracy and clarity were of high importance for focus group participants.<br><br>Participants wants known more about:<br><br>➢ Education of the consumer<br>➢ Traceability | Consumers are informed by short routes and they must be given clear and quick information.<br><br>It is necessary to make a good job of teaching, telling the truth about the food product and its process.<br><br>The more information about the food product or the food process the better. | Education was highlighted by the media and the authority body as an important driver to improve consumer trust and there is an urgent need to implement education programs about how food is produced.<br>The participant from food industry mentioned that veracity if the information provided by the media | N/A | Participants from focus group demand honesty, accuracy and clarity with more information of traceability and environmental impact. This is also the opinion extracted from the workshop with also demand more information and a label ensuring quality. However, the conclusion from the interview show that there is a lot of information but it is not clear and negative news are highlighted moving the trust to the background.<br><br>It is necessary for companies to carry |

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| | ➢ Information on the impact on the environment of the product | Food company´ value proposal it is a key point. The competition among food companies. The one that gives more to the consumers (better relation quality/price, better tasty, brand guarantee, sustainability, ethical) will get the final consumer.<br><br>Quality labels: nowadays the consumers want more than a quality label, they want more information.<br><br>Participants think that pushed by the Coronavirus crisis, real communication has been increased: real workers - not advertising models- in real time in a real factory.<br><br>Unsatisfied consumers and misleading advertising campaigns can decrease consumer trust | and the government is crucial to build trust in the food chain.<br>The authority body identified misinformation as an important issue and recognized that they must make an effort to be positioned as a referent for consumers who want to know more about food.<br>The participant from the media considers they have the responsibility to bring to the consumers not only negative news about food but also the mechanisms that are used by the industry to ensure food security. | | out continuous educational work with consumers, not as a marketing action but based on honesty and clarity, as this can provide a competitive advantage over other brands and/or products, misleading advertising campaigns can decrease consumer trust. |
| **Perceptions of marketing practices and how it impacts consumer trust** | Participants trust less in foods that are advertised a lot. In general they do not trust new foods and that do not seem natural<br><br>Participants did not consider to be greatly influenced by specific marketing campaigns, that can even have a negative effect, but they mentioned that trends | The best way to generate confidence is to provide information with reliable data to oppose the fake news. Show data of the research projects that the companies are developing. Data or numbers contrasted by other entities (research centres, universities, consulting | The food industry representative considers that marketing campaigns and trends are nowadays influencing consumer behaviour, even though many consumers do not know the sector practices. The participant indicated that marketing campaigns should be led | The survey results show that marketing practices are not among the most valued actions to build their trust on the food supply chain and their actors. | Here there is a gap between consumers and people from the food industry since first think that too much advertising is not good, while the others opine that good marketing campaigns may be effective.<br><br>It is necessary the prevalence of an ethical behaviour in their design and generation of the messages adjusted to reality and reliable data. |

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| | affect customer behaviour, especially those related to certain ingredients (for instance, palm oil).<br><br>The influence of marketing campaigns highly depends on the customer´s interest and previous knowledge<br><br>The transparency of the companies when carrying out their communication campaigns or if an ethical behaviour prevails in their design and generation of the messages adjusted to reality get an important relevance | firms, specialists in the sector...) that are showing that what you put on the shelf or on your packaging is true.<br><br>The technological advances and the technological investments in innovation that the food companies are making to increase both the quality of the food products and the knowledge of the consumers behaviour have a positive effect over the consumers´ trust.<br><br>To have a direct contact with consumers make consumer feels that is the centre of the food company.<br><br>There are several factors that can influence the opinion of consumers such as the social media, especially the positive comments or opinions from other people and the opinion of influencers or consumer organizations..., but currently there are no large groups that generate "blind" trust as happened a few years ago with some key food industries. | by the public administration and in collaboration with other sectors.<br>The media representative highlighted the importance of making the collaboration between administration and industry visible through campaigns, whereas the authority body mentioned that different sectors of the public administration should launch more campaigns in collaboration and focused on the consumer | | The contrast through other independent entities, external to the organization, seems to take a fundamental role on trust. |

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| | | Participants believe that it is more important give information instead of publicity.<br><br>The commodities, sometimes there are companies that are using terms wrongly (such as sustainability, km 0, innovation) that have a negative effect over the rest of the food companies that are doing a good job. | | | |
| **Perceptions of crisis/scandal management and how it impacts trust** | Participants believe that in the food system. But when there are food scandals, their confidence is raised a lot or they stop consuming some food.<br><br>A single food scandals have a great impact on their trust on the entire food chain. | Participants think that pursue the fraud for consumers it is a must.<br><br>Negative feedbacks are sometimes unfounded or given by people with not a specific expertise. Social media, especially negative comments or opinions from other people and the opinion of influencers on Instagram, Twitter and other platforms, radio or television sometimes spread this news to the people. | The perception that consumers have of single food scandals are considered by interviewees to have a great impact on their trust on the entire food chain.<br>The food industry representative considers that these food crises had more impact some years ago than now because now everything is led by information. Related to this, the participant from the media stated that food issues that affect a single product but have a great resonance in the media might negatively affect other products or companies not related to the issue because the consumer makes | N/A | In general, all have the same opinion. When it occurs a food scandal, the consumers´ trust is diminished. However, people from the industry think that scandals are less probable at this moment than in the past decades.<br><br>However, negative opinions, unfounded comments given on the Internet and in social media by non expert people or influencers, can have a significant impact on a company's reputation. |

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| | | | associations. | | |
| **Perceptions of sustainability and how it impacts trust** | Participants talked about:<br>➢ **Waste and plastic reduction**<br>➢ **Environmental impact**<br><br>The food supply chain should prioritise addressing these sustainability matters. | In this area, the most important things to generate consumer trust are: sustainability, convenience and ethic (social and environmental sustainability).<br><br>Consumers want sustainability investment, but in a competitive way (linked to price) and also initiatives to work increasingly with compostable or recyclable packaging materials. | Sustainability was not specifically addressed during the conversation, but the food industry representative mentioned that current trends in everything concerning the environment is influencing consumer trust and behaviour. | Sustainability, in terms of ensuring animal welfare and supporting the environment was highlighted by consumers as two of the three top for farmers in relation to consumer trust. | It exists a concern about more sustainability but with different approaches. People in the focus groups talked about plastics and environment, while consumers of the Delphi survey highlighted animal welfare. People of the workshop think that consumers want sustainability investment that not increase the price a lot. |

# Implications for future EIT projects and implications for industry

| Categories | GAP ANALYSIS<br>(Summary of key points) | Implications for future research (e.g. EIT funded work within this grand challenge in years to come) | Implications for industry actions to improve consumer trust (e.g. which type of activities may be beneficial, what type |
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| | | | of communication campaign) |
| **Perceived trust in supply chain actors (farmers, manufacturers, retailers, governmental bodies)** | -Improve trust in authorities and retailers through external bodies, transparency and honesty.<br>-Improve trust in labelling through avoiding unnecessary and/or low-quality ingredients. It seems essential to think about a new design of the current labels. | Find out what the perfect label for the consumer should look like in terms of both content and design.<br><br>EIT could be an external link between consumers and food companies to propose, promote and implement real actions and measures to improve user trust in the food system.<br><br>EIT could investigate the origin of consumers' phobias such as chemophobia and MGOs rejection. | It seems essential to think about a new design of the current labels.<br><br>Avoiding/Decreasing the systematic use of filling ingredients that make the product cheaper (potato, flour, palm oil, lard, flavourings...) can lead to a great increase in mistrust.<br><br>Design strategies of communication to avoid consumers food phobias |
| **Perceptions of food safety, food quality (and its ingredients) and its impact on consumer trust** | -Improve transparency and labelling<br>-Improve trust in superstores vs local store for example with more personalized treatment. | Carrying out a concrete and in-depth analysis, on how renowned companies are addressing safety and quality with consumers as well as the real impact that this approach has on consumers and look for measures to improve it. | Be willing to collaborate, be actively involved and be transparent with companies and entities outside their organisation. |
| **Perceptions of transparency and its link to consumer trust** | -More transparency: information more clear, detailed and transparent.<br>-Retailers may not be transparent sometimes | Analyse in depth what terms like transparency, honesty, security, local... mean for the consumer and seek to propose alternatives and measurable actions for their improvement. | To create a multidisciplinary work team with the aim of improving trust and carrying out proposals for improvement worked on together. |

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| Perceptions of locality and its link to consumer trust | -Locality is always trustable | Analyse all possible alternatives on how the proximity of the local area could be used to improve consumer confidence in order to design a plan of actions to be carried out by the other bodies involved. | Participate in the analysis of possibilities, define a viable scenario for the execution of actions, commit to their implementation and share results. |
| Perceptions of traceability and its link to consumer trust | More information about food origin and traceability implies more trust | Providing the latest consumer information about how the traceability of a food product is carried out linked to European programs such as "From farm to fork" | Include information about food origin in the label maybe including, for example, a QR code in the packaging |
| Perceptions of communication and information sharing (education, raising awareness, labelling) and its impact on trust | -It Is necessary more honesty, accuracy and clarity<br>-People demand more information about food origin, traceability and environmental impact | Providing the latest consumer trends on what issues are most in vogue and how to address them most effectively... | Being permeable to external analysis and open to carry out suggestions for improvement. |
| Perceptions of marketing practices and how it impacts consumer trust | -It is necessary less advertising but more clear | Analysing externally the impact that the actions carried out by renowned companies have on consumers and proposing multiple alternatives to face their improvement. | Allocate part of the budget to implement these actions. |
| Perceptions of crisis/scandal management and how it impacts trust | -Large-scale scandals can damage consumer trust. | Analyze how the consumer perceives the quality stamps (e.g. ECO), or understand basic differences between all the protected designations of origin and preographical indications of foods | Ensure the proper implementation of the quality assurance system<br>Strengthen the quality assurance system of the company<br>Administrations of each member state of the European Union should also be involved in this task |
| Perceptions of sustainability and how it impacts trust | Sostenibilidad como economia y social<br><br>Añadir en etiquetado información de | | |

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| | impacto social y medioambiental | | |

# How can the insights of the report inform the planned crowd ideation

[Please share your ideas/thoughts on the following].

- Which gaps could possibly be filled through a communication campaign?
- Which 1 or 2 potential industry actions (including communication campaigns) may benefit significantly from crowd ideation?

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# Country-level Gap Analysis - Israel

This activity has received funding from EIT Food, the innovation community on Food of the European Institute of Innovation and Technology (EIT), a body of the EU, under the Horizon 2020, the EU Framework Programme for Research and Innovation

| Deliverable | |
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| Title: | Country-level gap analysis |
| Type of Deliverable | R: Document, report |
| Authors: | Liat Levontin<br><br>Kim Penias |

# Executive Summary

In the first year of this EIT Food Grand Challenges project (2020), Israel partners have conducted several focus groups and a Delphi survey with consumers, and workshops and interviews with industry experts, to gather insight into consumers' trust in the food supply chain. This report aims to bring together the insights collected through the methods mentioned above to highlight the gaps between consumers' and industry views on consumers' trust in Israel. This gap analysis enables us to identify future initiatives and industry actions that can improve consumers' trust in the food supply chain and its actors.

After a brief introduction, in which sample characteristics related to the four data collection methods are summarised, the country-level gap analysis for Israel is introduced (Section 3). In Section 4, implications for future EIT projects and implications for industry about the gap analysis are explored. At the end of the report, some potential ideas regarding the crowd ideation are proposed (Section 5).

# Introduction

The current report includes data collected via focus groups, industry workshops, interviews with food industry key informants, and a Delphi survey with Israel respondents. Overall, there were X participants in all stages. All stages were conducted in Hebrew.

The **focus groups'** data was collected through six focus groups using the ZOOM platform. Each lasted about two hours and contained four participants (24 participants in total). Each group was composed of an equal mix of males and females who buy food for their household. In each group, half the members were with academic education. Four out of 24 of the participants were 21-29 years old who do not have children, eight participants were 25-39 years old who have children up to ten years old, eight participants were 40-55 years old who have children aged 11+ who still live at home, and four participants were 60+ years old.

Two **industry workshops** were conducted via the ZOOM platform. Each lasted about 1.5-2 hours and contained four to six participants (ten participants in total). Participants were senior managers in food companies, six females, and four males. Their positions were: vice president of regulation and corporate responsibility at a global manufacturing company, consumer service manager of a manufacturing company, CEO of an import company, CEO of a sector at a manufacturing company, brand manager In a manufacturing company, the director of health in a manufacturing company, marketing manager at a large company, manager of innovation at an international food company, manager of innovation in an organization related to the Regulator, senior manager at a regulatory office.

For the **industry interviews**, we conducted three interviews with seniors in the media and food industry. Each interview lasted about 30-40 minutes. One participant was a publisher and the CEO of a well-known media company, the second was the Chief Scientist of a food manufacturer, and the third was the CEO of a regulatory association.

In the **Delphi survey,** there were 364 Israeli participants. 183 (50.3%) identified as female and 181 (49.7%) as male.

The next section includes Israel gap analysis across all data sources. Afterward, we will discuss the implications for future research projects and industry initiatives.

# Country-level gap analysis

| Categories | Consumer Focus group finding | Industry Workshop finding | Industry Interview finding | Consumer Delphi survey finding | GAP ANALYSIS |
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| Perceived trust in supply chain actors (farmers, manufacturers, retailers, governmental bodies) | **Farmers**- ranked at the top of the trust scale. Participants expressed emotional solidarity with the farmers' vulnerability, high esteem for their integrity, and dedication to supply Israeli agriculture produce (pure and high quality).<br>**Manufacturers-** ranked in the middle of the trust scale. Due to the growing competition and journalists' investigations, they are considered to behave more carefully. They have gained higher trust since the trust breakdown occurred almost a decade ago. Emotionally, they are perceived as creators of food, which inspires trust.<br>**Food importers-** ranked below the food manufacturers because they | **Farmers**- Participants thought that consumers have the highest level of trust in farmers. They believe that the closer the actors are to raw food components (such as vegetables), the higher the trust. Farmers receive the highest degree of trust since they are closer to the land, experience difficulty, and have a relatively low profit.<br>**Manufacturers-** Also enjoy high consumers' trust because they are more transparent than other food chain actors.<br>**Retailers-** Consumers' trust in retailers is perceived as low because consumers feel that | The media interviewee is not involved in any trust initiatives but is a big believer in the meaning of trust for the consumers. The industry and the regulatory association interviewees believe that consumers' trust is the most critical issue in every company. Without it, consumers would not buy the products. | The Consumers Delphi survey in Israel suggested that people most trust **farmers** amongst the main actors in the food supply chain. In general, food **manufacturers** were the next trusted actors, followed by food **retailers** and **government authorities**, while **foodservice providers** (e.g., restaurants and catering) were least trusted. | All groups agreed that farmers are the most trusted actor in the food supply chain. Manufacturers perceived as relatively trustworthiness, followed by retailers and governmental bodies. The Delphi survey has added another group of actors, restaurants, and caterings, who seemed to gain a lower level of trust. |

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| | are not food creators but an intermediate link. Emotionally they have not yet been released from the image of a 'predator' who tries to block competition to maintain high prices.<br>**Retailers-** ranked lower on the trust scale. During the past decade, retailers (large chains) were considered 'champions' of fair pricing, thanks to private labeling, parallel import, and frequent promotions. However, today, they have gained too much power, which is now turned against consumers and farmers.<br>**The Regulator** – ranked low by most and high by a minority. The Regulator is criticized for failing to protect the consumers because of a lack of resources, motivation, and integrity. The minority who ranked the Regulator higher expressed a general trust in the government and authorities and regarded the 'health-stickers' as proof of its trustworthiness. | retailers are trying to entice them to buy unnecessary products.<br>**Small vs. big companies**- Participants thought that small companies receive higher consumers' trust (compared to large companies), as they are perceived as more authentic, only trying to survive and not trying to make a profit at the consumer's expense. On the other hand, large companies have an advantage as they can establish long-term relationships with their customer and build a reputation that will contribute to consumers' trust in them. | | | |
| **Perceptions of food safety, food quality** | Product quality and ingredients are considered critical for trusting manufacturers and farmers since | Participants noted that when consumers buy products, they always expect to receive | All participants agreed that food quality and safety are a crucial factor | The Delphi survey findings indicate that food quality and its ingredients are the | Food quality and safety seem to be important factors influencing consumers' trust. |

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| **(and its ingredients), and its impact on consumer trust** | they have the highest impact on quality. This element is perceived as an integrator of everything important for the consumers (such as taste, freshness, health, naturality, safety, etc.). For consumers, product quality is mediated mostly by its pack's labeling, the actual usage, and the brand's longevity. Secondly, it impacts trust in retailers and importers who are responsible for preserving the product quality during transport and storage. Lastly, Quality is also related to the Regulator whose job is to push the whole food industry to improve food quality but does not fulfill this sufficiently.<br>Participants also said that improving products and their components is a trust-building step by itself. | the same product at the same high-quality level. These affect consumers' trust in the company and the product. Consumers know that the product has high quality, has strict production processes, and high consistency. | that affects consumers' trust. Food quality and safety were perceived as important factors, both by the industry representative and the regulatory association representative. In accordance, the media representative participant believes that the components of the food have an essential role. | second most important factor for trust in restaurants and caterings. As participants ranked "Be honest about the products they include (e.g., organic or free-range)" at the second place in a matter of importance. | It was agreed in the focus groups, industry workshops, industry interviews, and the Delphi survey. In the focus group, the quality was related to all food supply chain actors. While the Regulator is perceived as the actor in charge of food quality, it is also perceived as not fulfilling its duty. However, in the workshops, the quality was mainly referred to as manufacturers' companies (which might be affected by participants' occupation). Moreover, in the Delphi survey, food quality was an important factor in the context of food ingredients in restaurants and caterings. |
| Perceptions of transparency and its link to consumer trust | Transparency has an impact on trusting all food chain suppliers. It offers the consumers an opportunity to penetrate through the 'black box' of the product and the organization. Farmers are appreciated as being the most | Participants believe that companies that communicate well with consumers are transparent in their actions, and communicate the actions to consumers also enjoy high | Transparency has been repeatedly mentioned in all interviews as an important factor that positively influences consumers' trust. Participants mentioned it | Transparency is perceived as a crucial component of building trust. For farmers, charging fair prices for their products was ranked as the most important action to build trust. | Consumers' desire for higher transparency from the different food supply chain actors was repeatedly mentioned in focus groups, workshops, and interviews. It is related to every action the |

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| | transparent, while the Regulator is rated as the least transparent. The manufacturers and importers are transparent regarding the nutrition values labeling and their behavior in adverse recall events. But are not transparent enough about the ingredients naming and the relation between packs' size-content-price. The retailers are perceived as behaving reasonably with returns of out of date products but lack transparency regarding pricing labeling and shelves arrangements. | trust levels. Companies that respond to consumers inquiries in the public space (social networks), which report faults before they are discovered by consumers and perform these actions transparently in the public space, are companies that will gain higher consumers' trust. The issue of transparency was repeatedly discussed throughout the workshops. Participants believe it has an important role in consumers' trust. | in various contexts (e.g., food components, scandal management, environmental impact, and working conditions). | For manufacturers, all three most important actions were related to transparency: Improve transparency (first), charge fair prices for their products (second), use honest/accurate labeling (third).<br>In accordance, charging fair prices was ranked as the most important activities related to trust in restaurants and catering. The second most important action was being honest about the products they include (e.g., organic or free-range).<br>For retailers, the second most important action for building trust was making pricing practices more transparent. | actors choose to perform, such as labeling and information on packages, prices, package size, social network customer service, product faults, etc. In the Delphi survey, transparency was mentioned as an important action that could improve trust in all food supply chain: farmers, manufacturers, restaurants and caterings, and retailers. |
| **Perceptions of locality and its link to consumer trust** | Locally produce is connected to higher trust levels, mostly among farmers. Local agriculture produce is associated with the land and earth and with being Israeli. It contributes to the high trust in the | Participants think that "Israeli" products and companies gain higher consumers' trust. | The industry and the regulatory association representatives believe that the products' origin might influence consumers' trust. The | N/A | Local products are perceived as having a positive influence on consumers' trust. In the workshops, Israeli products were conceived as more trustworthy due to their |

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| | Israeli farmer. Importing fruit and vegetables is perceived negatively: it serves the importers' profit and hurts the local farmers. And it is of lesser quality than the local produce. | | industry representative mentioned that local products might gain higher consumers' trust, whereas the regulatory association representative referred to local products as products that gain lower consumers' trust due to their relatively higher prices (which stems from higher production costs). | | locality; thus, both Israeli farmers and Israeli manufacturers will gain higher consumers' trust. However, focus group participants mentioned higher trust towards Israeli farmers but not manufacturers. Interestingly, it was mentioned in the interviews that locally produce might also have a negative influence on trust due to higher production costs that lead to higher product prices. |
| **Perceptions of traceability and its link to consumer trust** | Products' sources are not always known and sometimes are unreliable, which undermines consumers' trust. | N/A | N/A | Traceability was ranked as the third most important action in improving trust with farmers and restaurants and caterings. | Traceability was mentioned in focus groups and the Delphi survey. It might enhance trust by increasing transparency. |
| **Perceptions of communication and information sharing (education, raising awareness, labeling) and its impact on trust** | Participant perceived communication and information sharing as a crucial component that affects trust. Participants feel that they must trust the manufacturers and the information on the label. Since they cannot know what there is truly in the product and the process. The information provided (nutrition table, ingredients, expiry | Consumers value direct and immediate communication, which creates a higher trust level between the consumers and the company. The food industry "embraced" the Food labeling law in Israel, improved products, communicated with consumers, and publicly | The media and the regulatory association interviewees believe that sharing information regarding the products, companies, and the stories behind them increases consumers' trust. | Honest and accurate labeling is perceived as the third most important component that influences consumers' trust in manufacturers. | The way companies communicate with consumers is essential for building and maintaining trust. Communication was mainly referred to as manufacturers and the information they provide on their product packages. The interviewees mentioned the |

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| | dates, quantity) is under check and suppose to respect "true advertising."<br>Applying the health green and red stickers enhanced trust and motivated the market to improve products. The stickers are clear and support the product's promises | supported the law. These actions increase consumers' trust in the food industry. | | | importance of the story behind the company, and workshop participants mentioned the importance of constant immediate communication. |
| **Perceptions of marketing practices and how it impacts consumer trust** | Food suppliers are perceived to have achieved too much understanding of consumers' wants and needs, which they use to manipulate consumers to serve their interests and against the consumers' benefit. It is perceived as a threat for the consumer: exhibiting more understanding seems to weaken trust rather than enhance it. | Participants agreed that social involvement and sustainability indeed contribute to consumers' trust; however, they think companies should be careful of greenwashing and misuse of these actions, which might lead to a decrease in consumers' trust.<br>Also, they noted that collaborations with entities that lobby against the food companies for various reasons might produce positive connections that will eventually increase consumers' trust. Such a collaboration decreases the degree of antagonism and increased consumers' trust among the specific community. | N/A | Honesty in marketing and advertising was considered as the third most essential action in increasing trust in retailers. | Marketing practices and their impact were not a central issue when discussing factors that might influence consumers' trust. However, indirectly, participants in focus groups, workshops, and the Delphi survey have mentioned marketing practices issues. Focus groups participants have mentioned that the knowledge suppliers gather regarding consumers is wrongly used to serve their interests (higher profit). Workshop participants mentioned greenwashing as a factor that might decrease trust and collaborations with antagonistic entities as an action that might increase trust. In the Delphi survey, it |

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| | | | | | was referred to in the context of marketing transparency. |
| **Perceptions of crisis/scandal management and how it impacts trust** | Transparent behavior in recall events is essential for building and maintaining consumers' trust. Participants understand that there might be mistakes, but the thing that affects their trust is how an actor manages this mistake. If the actor is fully transparent, take responsibility for the fault, inform the public, collect the faulty products and publish their intended actions to avoid recurrent incidents, their trust will not be significantly harmed and will restore quickly. | Participants argue that every company has faults, but how companies deal with those faults is crucial for consumers' trust. In the event of a product malfunction, poor management may harm consumers' trust. Even if a company recalls a product, it might lose a significant share of its customers if the conduct is not good enough. Consumers' trust might be damaged. | The regulatory association interviewee discussed scandal management in the context of transparency. It was mentioned that transparency is essential in crisis management to maintain consumers' trust. | N/A | From focus groups, workshops, and interviews, raise that consumers understand and accept that a product might be faulted or damaged and that fact alone does not impact their trust level. However, the way a company deals with fault impacts trusts directly. The trust level in companies will not be affected if they transparency communicate with their consumers regarding the fault. Contrary, if a company does not handle a crisis with full transparency, consumers' trust will decrease. |
| **Perceptions of sustainability and how it impacts trust** | N/A | Some participants noted that when consumers receive information about a social contribution made by a brand, it creates a positive reputation for the brand and increases their trust in it. However, as mentioned before, companies should be | National authority representative thinks that social responsibility (CSR) activities are an essential factor influencing trust. The industry interviewee also pointed out social involvement (e.g., donations) as an activity | "Rear animals to high animal welfare standards" was ranked as the second most important action that affects farmers' consumers' trust. | Sustainability was mentioned in different ways in the workshops, interviews, and the Delphi survey. In the Delphi survey, sustainability was discussed in the context of animals' welfare and its impact on trust in farmers. Workshop and interview |

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| | | careful of the misuse of these cations, which might decrease consumers' trust. | that engenders trust. | | participants mentioned social contribution as a factor that might enhance trust. However, companies should be careful of greenwashing, which might decrease consumers' trust. |
| **Other issues affecting trust** | Checks are considered the Regulator's assigned responsibility. However, participants feel that the Regulator fails to fulfill this. Though all food suppliers are assumed to conduct their internal checks, these are not open to the public. Therefore, checks are considered to have less impact on trust than would have been expected. However, the lack of checks reduces trust in food throughout the food chain. | Class actions, Politicians and the media, Positive customer experience, Keeping promises, and stable prices | | Improving in-store hygiene practices is perceived as the most important action that retailers could do to increase consumers' trust. | |

## Some Key Insights from the GAP Analysis:

There was a consensus across all groups regarding trust levels in the different food supply chain actors. While farmers and manufacturers were the most trusted actors and retailers and governmental bodies followed.

Food quality and safety were agreed to have a substantial impact on consumers' trust. Transparency and communication have been mentioned as crucial components in all groups as well. Transparency is related to all other trust issues, such as labeling and information on packages, prices, package size, social network customer service, crisis management, etc. Communication was only referred to as one-sided communication, from food companies to the consumers.

On the other hand, marketing tactics' impact on trust was not discussed directly and is not consciously perceived as an essential factor influencing consumers' trust. Also, there was no agreement between the various groups on the importance of traceability; in some, it came up, and in some, it was not mentioned at all.

# Implications for future EIT projects and implications for industry

| Categories | GAP ANALYSIS<br>(Summary of key points) | Implications for future research (e.g., EIT funded work within this grand challenge in years to come) | Implications for industry actions to improve consumer trust (e.g., which type of activities may be beneficial, what type of communication campaign) |
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| Perceived trust in supply chain actors (farmers, manufacturers, retailers, governmental bodies) | All groups agreed that farmers are the most trusted actor in the food supply chain. Manufacturers perceived as relatively trustworthiness, followed by retailers and governmental bodies. The Delphi survey has added another group of actors, restaurants, and caterings, who seemed to gain a lower level of trust. | Understanding why food manufacturers are perceived as more trustworthy compared to others. | Enhancing trust in the governmental bodies by publicizing their regulation processes. This action might affect the trust levels in the whole food supply chain. |
| Perceptions of food safety, food quality (and its ingredients), and its impact on consumer trust | Food quality and safety seem to be important factors influencing consumers' trust. It was agreed in the focus groups, industry workshops, industry interviews, and the Delphi survey. In the focus group, the quality was related to all food supply chain actors. While the Regulator is perceived as the actor in charge of food quality, it is also perceived as not fulfilling its duty. However, in the workshops, the quality | Exploring where consumers believe their country's chain supply stands in food quality and safety. Do consumers believe the country's produce is safe and of high quality? What makes consumers believe so?<br><br>Identifying the actor perceived as the one that can change consumers perspective on food quality and safety (Regulator? Manufacturer?). | Creating a tool (app) that provides the consumers with understandable information regarding products.<br><br>Publicly share the production process of products by manufacturers.<br><br>Publicly share the transportation of products by retailers. |

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| | was mainly referred to manufacturers' companies (which might be affected by participants' occupation). Moreover, in the Delphi survey, food quality was an important factor in the context of food ingredients in restaurants and caterings. | | |
| Perceptions of transparency and its link to consumer trust | Consumers' desire for higher transparency from the different food supply chain actors was repeatedly mentioned in focus groups, workshops, and interviews. It is related to every action the actors choose to perform, such as labeling and information on packages, prices, package size, social network customer service, product faults, etc. In the Delphi survey, transparency was mentioned as an important action that could improve trust in all food supply chain: farmers, manufacturers, restaurants and caterings, and retailers. | Exploring the level of transparency needed to increase consumers' trust. What kind of information consumers would like to get?<br><br>Understanding the negative impact extreme transparency might have on the different food supply chain actors and for consumers. | Explain and communicate actions to the consumers before taken.<br><br>Share as much information as possible (information that will not harm the company/organization). |
| Perceptions of locality and its link to consumer trust | Local products are perceived as having a positive influence on consumers' trust. In the workshops, Israeli products were conceived as more trustworthy due to their locality; thus, both Israeli farmers and Israeli manufacturers will gain higher consumers' trust. However, focus group participants mentioned higher trust towards Israeli farmers but not manufacturers. Interestingly, it was | Investigating how to leverage COVID-19 influence to maintain and increase trust in the local actors.<br><br>Examining whether locally produce gain higher or lower trust, considering the higher prices in Israel. | Supporting and promoting local produce by retailers and governmental bodies. |

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| | mentioned in the interviews that locally produce might also have a negative influence on trust due to higher production costs that lead to higher product prices. | | |
| Perceptions of traceability and its link to consumer trust | Traceability was mentioned in focus groups and the Delphi survey. It might enhance trust by increasing transparency. | Exploring the impact traceability might have on consumers' trust and understanding its link to product safety and transparency perceptions. | Creating a system that traces food production and transportation, from the moment the ingredients were harvested from the ground and processed until the product reached the shelf. |
| Perceptions of communication and information sharing (education, raising awareness, labeling) and its impact on trust | The way companies communicate with consumers is essential for building and maintaining trust. The issue of communication was mainly referred to manufacturers and the information they provide on their product packages. The interviewees mentioned the importance of the story behind the company, and workshop participants mentioned the importance of constant immediate communication. | Exploring if the labeling of products contributes to consumers' trust directly and if it affects consumers' choices regarding unhealthy food products.<br><br>Identifying how to educate consumers best and transfer knowledge on food components and its significance. | Creating a tool (app) that provides the consumers with understandable information regarding products.<br><br>Communicate widely important information about food ingredients. |
| Perceptions of marketing practices and how it impacts consumer trust | Marketing practices and their impact were not the primary issues when discussing factors that might influence consumers' trust. However, indirectly, participants in focus groups, workshops, and the Delphi survey have mentioned marketing practices issues. Focus groups participants have mentioned that the knowledge suppliers gather regarding consumers is wrongly used to | Understanding the impact marketing practices has on consumers' trust.<br><br>Exploring the reason consumers and industry do not refer to marketing practices directly. Lack of awareness? Acceptance of the need in those tactics? | Address some of their marketing tactics and transparency issues. Explain to consumers what is behind them (might also harm the company and should be done carefully). |

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| | serve their own interests (higher profit). Workshop participants mentioned greenwashing as a factor that might decrease trust and collaborations with antagonistic entities as an action that might increase trust. In the Delphi survey, it was referred to in the context of marketing transparency. | | |
| Perceptions of crisis/scandal management and how it impacts trust | From focus groups, workshops, and interviews, consumers understand and accept that a product might be faulted or damaged, and that fact alone does not impact their trust level. However, the way a company deals with fault impacts trusts directly. The trust level in companies will not be affected if they transparency communicate with their consumers regarding the fault. Contrary, if a company does not handle a crisis with full transparency, consumers' trust will decrease. | Exploring case studied of crisis management to Identify the actions that should be performed in a crisis (actions that will not harm trust).<br><br>Understanding if there is a risk of extreme transparency during a crisis if sharing some sort of information might decrease consumers' trust in the long term. | Contacting consumers as fast as possible when there is a faulted product. |
| Perceptions of sustainability and how it impacts trust | Sustainability was mentioned in different ways in the workshops, interviews, and the Delphi survey. In the Delphi survey, it was discussed in the context of animals' welfare and its impact on trust in farmers. Workshop and interview participants mentioned social contribution as a factor that might enhance trust. However, companies should be careful of | Exploring the best way to communicate social contribution actions and raise consumers' awareness of the companies' activities. | Encouraging consumers to be involved in sustainability and social contribution activities through a communication campaign. |

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| | greenwashing, which might decrease consumers' trust. | | |

# How can the insights of the report inform the planned crowd ideation

- **Which gaps could possibly be filled through a communication campaign?**
  Most gaps could be addressed through a communication campaign. Especially: transparency, communication, marketing tactics, and sustainability and their impact on consumers' trust.

- **Which 1 or 2 potential industry actions (including communication campaigns) may benefit significantly from crowd ideation?**
  1. Creating a tool (app) that provides the consumers with understandable information regarding products (Communication and information sharing (education, raising awareness, labeling); Food safety and quality (and its ingredients)).
  2. Communicate widely important information about food ingredients, production processes, and transportation (education, raising awareness, labeling); Food safety, and quality (and its ingredients)).
  3. Encouraging consumers to be involved in sustainability and social contribution activities through a communication campaign (Sustainability)

# Country-level Gap Analysis – Poland

This activity has received funding from EIT Food, the innovation community on Food of the European Institute of Innovation and Technology (EIT), a body of the EU, under the Horizon 2020, the EU Framework Programme for Research and Innovation

| Deliverable | |
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| Title: | Country-level gap analysis - Poland |
| Type of Deliverable | R: Document, report |
| Authors: | Magdalena Klimczuk-Kochańska<br>Mikołaj Lewicki<br>Magdalena Supińska<br>Monika Strupiechowska<br>Małgorzata Maryl-Wójcik |

# Executive Summary

In the first year of this EIT Food Grand Challenges project (2020), partner countries have conducted a number of focus groups and a Delphi survey with consumers; as well as workshops and interviews with industry experts to gather insight on consumer trust in the food supply chain. This report aims to bring together the insights collected through the methods mentioned above, to highlight the gaps between consumers' and industry's views on consumer trust in Poland. This gap analysis enables us to identify future initiatives and industry actions that can improve consumer trust in the food supply chain and its actors.

After a brief introduction, in which sample characteristics with the four methods of data collection are summarised, the country-level gap analysis for Poland is introduced (Section 3). In Section 4, implications for future EIT projects and impact on industry concerning the gap analysis are explored. At the end of the report, some potential ideas regarding the crowd ideation are proposed (Section 5).

# Introduction

The data for this report has been gathered through 5 focus groups, one of which was a pilot group (number of participants:  Warsaw - 6 people; Skarżysko-Kamienna - 6 people, Kozienice - 4 people, Łowicz - 7 people, Warsaw - 5 people) with 28 members of the general public, 2 industry workshops with 14 participants in total, 4 interviews with actors from the food industry, and a Delphi survey with 366 responses from Poland (2199 respondents in total).

Overall, the **focus groups** had 15 female and 13 male participants. 12 participants were in the 18-40 age group, 11 were in the 41-60 age group, and 5 were in the 61-70 age group. Further, 15 participants were responsible for shopping in the household and 13 were not responsible for shopping in their household. Moreover, 6 participants were with higher education (first and second degree), 6 were with post-secondary and secondary education, 10 with basic and vocational education and 6 with lower secondary and elementary education. Further, 14 participants have incomes up to EUR 506, 9 with income EUR 506-1000 and 5 have income above EUR 1000. 7 participants were unskilled workers, 9 were skilled workers and women raising children, 7 occupied positions of specialist, 5 participants were entrepreneurs, freelancers or managers (also mid-level). 13 participants were living in households with a minimum one child, 7 participants were singles, 5 were living in pairs/together, and 3 female participants were pensioners.

In the **industry workshops**, 14 participants shared their views and experiences in the sessions, 7 of them being employees of companies involved in the food supply chain (food processors and manufacturers), 2 of them being consultants (industry advisors), 3 of them being employees of certification companies and 1 of them being a food journalist and a policy advisor for a wholesale/retail market (media/policy making). Participants hold positions ranging from CCO, COB, CEO, to R&D Director, Director of Strategy and VP of Communications and Marketing Manager in these organisations. For **industry interviews**, 4 interviews were conducted. Interviews lasted between half an hour to one hour and a half. Regarding sample characteristics, 1 interviewee was from the media industry, 1 of them was government authorities, 1 was an entrepreneur and mentor from the food industry, and 1 was a representative of the food industry federation. In the **Delphi survey**, from the 369 Polish participants, 184 respondents (50.3%) identified as female and 182 (49.7%) identified as male.

In the next sections, we will first present the Polish gap analysis, and then we will discuss the implications of this gap analysis for future EIT projects and industry initiatives.

# Country-level gap analysis

| Categories | Consumer<br><br>Focus group finding | Industry<br><br>Workshop finding | Industry<br><br>Interview finding | Consumer<br><br>Delphi survey finding | GAP ANALYSIS |
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| **Perceived trust in supply chain actors (farmers, manufacturers, retailers, governmental bodies)** | The group most frequently mentioned in the focus study were **farmers**, which is mainly because the respondents have most direct contact with them (in the study one of the critical trust-building factors is own experience and related personal knowledge of the actor). Trust in **farmers** is greatest since many consumers know farmers personally and have verified "suppliers". Consumers are aware of problems such as buying goods through an intermediary and selling them as their own, and the excessive use of additives. However, some of the consumers explain this by the low profitability and productivity of traditional agriculture. | Generally, the workshop participants **did not mention any particular group of actors of the food supply chain**, as trusted by consumers more than others.<br><br>Representatives of the organisations from the sector directly agreed about a little knowledge about consumer trust in the supply chain.<br><br>The concept (occurrence) of trust in food is not well-established in Poland. It is | During the interviews it was stated that the lack of trust in the absence of knowledge, that pushes consumers only into a variety of strange "niche" searches for "niche" products. for example **the lack of consumer trust in food sold in stores transfers consumers, e.g. to bazaars** (where, paradoxically, there is a low level of control and safety, and often products are of unknown origin, with new composition). This case shows how important is trust in the food sector and the necessary knowledge to trust other entities. | A Delphi survey of 366 Polish consumers (mean age = 47.14. S.D. = 16.044, with 50.3% identifying as female and 49.7% identifying male) suggested that amongst the main actors in the food supply chain people **trust farmers the most**. **Food retailers** were the **next trusted** actors, followed by food **service providers** (e.g. restaurants and catering) and **food manufacturers**, whilst **government** authorities were **least trusted**. | The concept of trust in food is not well-established in Poland, but both consumers and representatives of the sector recognise the need to address the topic of trust in food and the food supply chain in their activities.<br><br>Consumer trust is often based on "blind" belief/confidence and the "need" of consumer trust, rather than on informed trust shaped by information and education.<br><br>The conclusion is that often insufficient levels of information, knowledge and education lead to distrust. |

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| | Focus group participants mentioned that their trust in **food manufacturers and processors** is influenced by unfair practices, such as product non-compliance with the label, the use of additives and the overall preference for profit over the health of consumers. On the other hand, trust in **food manufacturers and processors** in a positive sense is often associated with tradition, brand and their own experience.<br><br>The honesty and positive experiences were emphasised as the primary determinant of trust in **retailers**. Respondents are more likely to trust the seller they know personally. The role of the retailer as a person who recommends the product is also appreciated (freshness, quality, and assistance in product selection).<br><br>Consumers do not quite recognise **food authorities and regulatory bodies**. They take for granted the existence of regulating institutions | visible mainly in the lack or the minimal number of initiatives and superficial understanding of trust, without referring to one's own perspective (obviousness, generics, the matter of one's own experience has appeared, but in a few cases, several times through the prism of professional activity).<br><br>Intuitively, it can be assumed that there is also **a lack of well-established consumer knowledge, a lack of knowledge about industry initiatives** from outside one's activity. Well-established knowledge about what is happening is a part of institutional activities - certificates, consumer expectations (as far as actual expectations, to what extent is a PR vision of expectations, created for certification systems). | The **need to monitor consumer trust** in the activities of enterprises in the sector was emphasised.<br><br>A common theme across stakeholder interviewees is the need to **cooperate, within and between different stakeholder groups**, due to the global nature of the food system and the multifactorial influences on consumer trust.<br><br>The industry respondents believe that Polish consumers nowadays are more aware than they used to be about food safety issues, including COVID-19, as well as food fraud. The respondents do not necessarily see this increased awareness as negatively, because if **consumers are paying more attention to labels and put** | | Consumers trust, according to the "assumption". What does it mean? It means that as consumers, we all trust food:<br><br>- to live we must eat therefore;<br><br>- we trust because we buy and eat;<br><br>- we trust the quality of food, we trust that what we eat is good, healthy and safe;<br><br>- if we stop trusting, we will stop buying.<br><br>On the other hand, the awareness of consumers and the desire to increase their knowledge is growing. But it concerns the more conscious part of the population (in the context of the country), i.e. educated people, from larger urban agglomerations.<br><br>There were no attempts to define trust in food and the supply chain during the workshop. It was taken for granted. On the other hand, there were doubts to what extent |

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| | that care for the quality of products. On the other hand, a low level of trust in the **government** correspondents with a less sense of control. The COVID-19 crisis was seen as sobering up to government institutions. | Doubts arose at the beginning of the workshops as to what consumer trust is. It was considered to what extent the purchasing behaviour of consumers is related to trust, and to what extent it is related to habit**. Trust is a matter of the relationship between the consumer and the food producer.**<br><br>From the point of view of industry representatives, it is essential to conduct initiatives in the area of increasing consumer trust.<br><br>The workshop participants also pointed out that companies can organise various types of actions and initiatives not only on their own but also in cooperation with other entities. | **more thought into the food, they shop generally**.<br><br>The main consequence of the lack of trust in food is **the cessation of buying food from a particular producer** as a result of detecting irregularities.<br><br>There is still too little knowledge at the consumer level about individual producers' actions in the field of food safety.<br><br>It is also connected with:<br><br>misleading media messages concerning food that lead to adverse consumer reactions and choices, and too little awareness concerning reading labels. | | consumers' actions were a manifestation of habit and to what extent trust in the sector.<br><br>Companies know little about consumers and their trust in the sector. Still, company representatives are aware of the fact that consumers know more and more and want to investigate, learn different things.<br><br>Consumers more and more often seek contact with companies themselves and inform them about problems with the product.<br><br>The common theme of all interlocutors is the need for cooperation within and between different groups of stakeholders, due to the global nature of the food system and the multifactorial impact on consumer confidence.<br><br>According to representatives of the sector, the consumer certainly trusts supranational organisations that |

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| | | | | | regulate the agri-food market, state and public regulators, such as Sanepid or commercial inspections, but also all kinds of information sources, such as food portals, or bloggers and influencers. |
| **Perceptions of food safety, food quality (and its ingredients) and its impact on consumer trust** | The respondents partially perceive **food safety and its quality** as related. The focus participants pointed to the link between **quality** and **brand** (in terms of reputation, tradition, traditional recipe, personal experience with a particular product or supply chain actor). Consumers believe that the **brand** is followed by **quality**, due to the maintenance of specific procedures and the reputation built up over many years.<br><br>Food safety remains an important factor in building trust. In this case, can be distinguished personal experience with a certain actor (usually **farmers** or trusted **manufacturers**) and the resulting certainty that the product is safe, compliant with the declaration (e.g. without chemical additives).<br><br>In the case of large chain stores | The workshop respondents focused mainly on food quality in their statements. They consider food safety as an obvious fact that has to be ensured during food production and is related to food quality.<br><br>Ecology in the perception of the mainstream consumer ceases to be an enigma. More and more people pay attention to whether the product is from **organic production**, where it comes from, how it was produced. It is evidenced by the fact that in the past, organic stores were niche, and now even supermarkets have entire | According to the interviews, the **close cooperation of various authorities** to ensure safety is essential.<br><br>Institutions that are responsible for the food safety and quality system have to not only control food producers but also they are responsible for **consumer education**. It is also necessary to promote these institutions' activities so that consumers know that someone watches over the food, and controls the food quality.<br><br>An essential role in the area | The participants of the Delphi survey did not point directly to actions related to food safety. However, when analysing the answers in the open questions, one can think that this is one of the main objectives that should be pursued by actors in the food supply chain. The findings of the Delphi survey show that a fair and indicated practice linked to food safety is to **inform about the exact composition of food products** (in particular additives) **and allergens, and to better label gluten-free/organic food.** | As is coming from the research the representatives of the sector representatives pay attention to the broader context of food safety and food quality, pointing to both aspects related to the conditions and rules of food production as well as compliance with systems confirming food quality. Consumers look more at food safety and food quality through the prism of the product itself - its packaging and labelling, its ingredients, and the brand of the food product. Based on these general conclusions, some of the more detailed findings follow. Food safety and quality have a tremendous impact on consumer trust.<br><br>Ecology and sustainable food production are becoming an important aspect here.<br><br>We observe the increasing trust of customers in various safety control |

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| | and **retailers**, it was positively assessed when the store accepted the complaint. In this case, consumers were able to overlook the problems with the quality and freshness of product**s.** | sections with **“eco” products**, or separate vegetable and fruit stands with products from organic farming.<br><br>In the case of animal breeding producers, more and more consumer interest is aroused by the way a given organisation treats animals. One of the participants of the meeting emphasised that the topic of **animal well-being** was not of any importance to most consumers a few years ago.<br><br>The response of entrepreneurs to such challenges on the part of consumers is the need to mobilise greater forces in terms of **improving the quality of products and offering the consumer other values related to the product**. It is crucial | of food safety and food quality plays the **packaging**, which informs about, e.g. that the producer produces a given food without the use of pesticides. There are also other actions to notify consumers that they can expect something better by buying this food. **Building trust is done through claims** about low water consumption, product locality, sustainability, being on the environment side, and consumer health. The initiative of a large actor in the food supply chain who has changed the way of production makes real innovation and educates the market. | | authorities, health promotion, and the activities of certification and food sector control organisations. It is because consumers attach growing importance to the quality of the product, which is associated with the company’s reputation in the eyes of the consumer.<br><br>Above authorities should simultaneously increase educational and promotional activities because this is what the consumer needs.<br><br>Another conclusion is the need for reliable information on the packaging and thus enhancing communication and education. |

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| | | because if it turns out that the purchases do not meet the requirements, it is very likely that consumers will share this negative information with a broader group of friends. It was also emphasised that sharing negative information is more frequent and faster than in the case of positive news, even if the consumer buys something tasty.<br><br>It has been pointed out that there is increasing customer trust in the control and operation of certification and inspection organisations in the food sector. It is because consumers attach growing importance to the quality of the product, and this is associated with the **company's reputation** in the eyes of the consumer. | | | |
| Perceptions of transparency and its link to | Respondents associated **transparency** mainly with the **integrity** of the actor in the food | The key trend that emerges is the consumer's expectation | The respondents of the interviews show that **consumers need and** | The findings of the Delphi survey show that transparency is the | Both the consumer and the sector representatives emphasise the growing importance of transparency. |

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| **consumer trust** | supply chain and the resulting good practices. Transparency was mentioned in the context of **consistency of labels** with actual composition or weight ("non-hiding something") and information on production methods.<br><br>Consumers highlighted that they appreciate when they can get to know the product before buying it. The transparency of the operations in the context of farmers makes it possible for consumers to forgive small shortcomings.<br><br>Furthermore, the participants of the focus study would like to be able to check what is happening behind closed factory doors and to know "from behind the scenes" about production methods and their compliance with procedures (mainly in terms of lack of additives). | of much greater transparency. If an organisation is not transparent, it is not easy to trust it. In the opinion of the workshop participants, this trend will be even more in the perspective of the next ten years.<br><br>According to the workshop participants' opinion, just a few years ago, good advertising was enough for the consumer to have an idea about the product and on this basis to shape his trust in a given organisation. However, significant changes in this area are currently visible. First of all, it is noticed that **the public knows and wants to learn more and more**. More and more consumers began to read labels, check the content of various ingredients in the product. Consumers pay attention to which components in the food | **expect clear, transparent information about a food product** (e.g., its ingredients, place of origin, production recipe).<br><br>It was also found that most consumers want to have **reliable information on food packaging**.<br><br>Customers also expect a **particular system to ensure control** of the actual quality of the food product.<br><br>The respondents find some reduction of transparency in the food system concerning information flow, e.g. **fake news** which increases press readership and traffic in social media (e.g. photo of "mouse" in milk), as well as insufficient knowledge of journalists about the food and food sector. | **third most important** action concerning trusting **retailers** in terms of pricing practices. The form of transparency understood as honesty in the labelling/product description on the label (calories, macro composition, and exact composition) was also mentioned for the **manufacturers** as the **first most crucial action**. Charging fair prices for their meals/food was the first **most vital** action about trusting **catering/restaurants**, **second** for **farmers** and **third** for **food manufacturers**.<br><br>Respondents also indicated as desired actions **openness, clear production rules and not hiding faults and problems**.<br>Transparency in the case of restaurants and | Consumers want to know more and more about food products. They look at the transparency of the food sector regarding consistency of labels with actual composition or weight and information on production methods. What more consumers would like to be able to look at the processes of production of food "from behind the scenes".<br><br>Actors of the food sector are becoming more and more aware of the growing interest of consumers in what and how producers do. They realise that approaching consumers, providing them with up-to-date and truthful information about food and its production processes, is essential to increase their trust in the food supply chain.<br><br>The downside/gap significant in this area are: fake news, bad communication, escalation of the problem and scandal in social media. |

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| | | are healthy, and which are unhealthy and undesirable. More and more consumers are also interested in the production process. **Being "closer"** could undoubtedly bridge the distance between the consumer and the producer and thus increase trust.<br><br>Providing truthful information and the offer is very important, as well as credibility in messages: **good quality for a reasonable price and actually offering it** (value for money).<br><br>The transparency is also related to **communication with the consumer** (not only through the banal, today, advertising on TV, radio or the Internet). This aspect must be included in the global transparency strategy of the food | | catering is seen as an opportunity to suspect the process of preparing a meal and to talk with people preparing meals (chefs, cook). | |

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| | | supply chain. | | | |
| **Perceptions of locality and its link to consumer trust** | The participants of the focus study repeatedly highlighted that **locality** is important for them, mainly in the context of the **country origin** of the products. In analysed case, it is about the **quality** attributed to local products, the maintenance of **procedures** (state control of local products), a shorter supply chain, but also the willingness to support the local economy.<br><br>In the study, it was noted that the respondents assess the localisation of products by their origin. In the case of food products specific to a particular region, those from that region (e.g. olives, wine) are preferred over so-called 'local patriotism'. When a local (Polish) product exists, consumers prefer it over a foreign one.<br><br>In the context of the COVID-19 outbreak, respondents positively assess the fact that they noticed and appreciated local products and local suppliers. The choice of local products was seen as | There is a **growing trust in small, family-run businesses**, which are often ecological factories with an environmental mission. In this case, local and regional products are usually significant.<br><br>Among the initiatives carried out on the Polish market, the initiative "Polska Smakuje" (Poland Tastes) was also mentioned during the meeting. It was popularised at various national and international fairs. Currently, the equivalent of this initiative is the mark "Produkt Polski" (Polish Product). It is entirely known among Polish consumers, and its success may result from the so-called consumer patriotism. It was also emphasised that from the producer's point of view it | N/A | Using local produce is the **second most important** action about trusting **restaurants and catering** in the Delphi survey among Polish consumers. Increasing the availability of local and domestic products **was the second most important** action concerning trusting **retailers**. Respondents also indicated adequate information about the origin of the products and better promotion of local (Polish) products. | The concept of locality in the consumer's perception is gaining more and more importance. Both consumers and industry are noticing this issue.<br><br>For industry actors, it is essential to build and, above all, maintain trust-based on local enterprises, firms, manufacturers and products locally produced by them.<br><br>Tradition as a derivative of locality is also essential - consumers trust "old", proven brands with a long tradition.<br><br>Locality, regionality, tradition - these are areas with great potential for the development of the aspect of consumer confidence.<br><br>The COVID-19 pandemic has shown that consumers felt more than ever the need for local supply chains and |

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| | **help/assistance** to actors in the food supply chain. | is not easy to obtain such a mark, because it shows that the product contains at least 80% of domestic raw material.<br><br>Another campaign presented during one of the workshops is „Czas na polskie super owoce" (Time for Polish Super Fruits). It is a national survey of fruit and vegetable consumption. It was implemented by one of the organisations participating in the workshop. The participant noted that such initiatives allow focusing on the consumer and proper communication with the consumer. And of course, they also promote the organisation.<br><br>Granting the products the „Jakość Tradycja" (Quality Tradition) certificate was mentioned as another initiative. It is a system | | | the need to support local producers and farmers. |

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| | | promoting high-quality products, elaborated and developed by the Polish Chamber of Regional and Local Products. Since 2007, this system has been recognised as the national food quality system by the Polish Ministry of Agriculture and Rural Development.<br><br>It is crucial to building and, above all, maintain **trust-based on tradition**, consumers trust "old", proven brands that have a long tradition on the market, and this should also be taken care of. | | | |
| Perceptions of traceability and its link to consumer trust | Respondents associate **traceability** with increased trust in food supply chain actors. It seems particularly important in terms of information on the **origin** of agricultural products and the problem of the resale by traders products bought on the stock exchange. | N/A | N/A | Quite unlike the focus study, traceability has proved to be one of the most important elements in building trust in actors in the food supply chain. For Delphi survey respondents, enabling traceability was highlighted as the **third** | N/A |

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| | | | | **most important** action in building trust with **farmers**. Making products traceable and making information about the traceability scheme easily available on the Internet was mentioned as the **second most important** action concerning trusting **food manufacturers**.<br><br>Using products that are traceable along the food supply chain was the **third most important** action in building trust with **restaurants and catering**. Stock products that are traceable along the food supply chain was the **first most important** action in relation to **retailers**. | |

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| **Perceptions of communication and information sharing (education, raising awareness, labelling) and its impact on trust** | Respondents saw the information-sharing as an essential aspect of building trust in actors in the food supply chain. **Transparency of labels** and their compliance with the facts was important for the participants of the focus study. The lack of appropriate information on the label was perceived as unfairness or a desire to conceal unfair practices.<br><br>Consumers saw the **sharing of information** (producer-consumer and consumer-consumer) as an initiative worth considering. Among the proposed actions, information campaigns on important aspects, such as food safety, were also mentioned. | One of the essential conclusions after the workshops is the participants' unanimous opinion that the essence of building and increasing consumer trust is in **consumers' education** and **deepening their awareness**, as well as **establishing and developing relationships** with them through innovative (bored with classic forms of advertising) channels and tools.<br><br>**Consumers themselves seek contact with the food companies**. They inform companies about possible problems with a given product. They submit inquiries about the product. This activity goes beyond the usual complaint activities. Representatives of the sector treat such changes in the sector as changes for the better. | During the interviews, it was noticed that the **level of trust of the consumers is closely correlated with the level of their knowledge** about, e.g. product's origin, official food control. Because of that, the communication and sharing of information with consumers are essential.<br><br>Consumer education providing reliable knowledge about food is conducted now especially by **sector organisations** by websites with thematic pages (e.g. about good fats, food additives), and activity in social media (e.g. fact and myth about food).<br><br>Critical is **the education of journalists** who are interested in the food sector. They should better understand, e.g., official food control systems, to prepare publications targeted at consumers with better understanding and | In open answers, respondents reported the need for communication and exchange of information from **food manufacturers**. It was also recommended that the suggestions and opinions of consumers should be taken into consideration and used in media communication. | Both sides notice the importance of communication and information sharing between industry representatives and consumers. Consumers, however, primarily pay attention to the communication tool, which is the label. At the same time, they see the vast role of information campaigns, e.g. on food safety and food quality.<br><br>Representatives of the sector note that the essence of the building and increasing consumer trust is in consumers' education. The level of knowledge about various aspects of the sector's functioning is often relatively modest. Moreover, the consumers are more and more willing to share their - especially negative opinions about the sector and its products - by using social media. On the other hand, it is noticed that consumers themselves seek contact with the food companies, which is perceived positively and gives a lot of room for actors from the sector to show off.<br><br>Implementation of the above it is possible using the entire spectrum of |

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| | | The workshop participants noticed that **consumers are more and more willing to share information on social networks**. Social media, friends on Facebook and Facebook groups and recommendations are the best information channels that consumers use. Everyone is looking for information on what to buy, why to buy it and where to buy it.<br><br>It has also been noticed that **consumers are already overloaded with advertisements** that do not carry anything with them, apart from manipulating the tastes of customers.<br><br>Representatives of companies agree that **more effort should be put into translating** | awareness of food sector issues.<br><br>**Initiatives promoting food in the media are significant.** Activities such as organising campaigns or advertisements showing health aspects are positively correlated with the process of building consumer trust as well as showing the pro-ecological and health-promoting relation. | | tools and channels (packaging - composition, certificates, non-standard forms of advertising/communication, programs, initiatives and industry events, social media, food quality and control systems, conferences, training workshops for business/entrepreneurs/journalists in the field of trust). |

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| | | **certificates, the benefits of ingredients in food, the benefits of using a given type of packaging, or production technology in a way that will be "user friendly"**. It should help consumers find their way around all the issues and information they are currently bewildered about. | | | |
| **Perceptions of marketing practices and how it impacts consumer trust** | Some participants of the focus study considered marketing techniques **positively** (advertising, participation of media experts and celebrities in product promotion). They stated that it **helps** them to choose products from a wide range (especially if the products do not differ significantly). They also considered that an expert, if there is experience behind him, cannot be wrong.<br><br>However, some respondents admitted that they do not trust marketing techniques because **experts** are paid and therefore, **untrustworthy**. The forms of paid cooperation were particularly negatively perceived (celebrities with contracts with food | The participants of the meetings noted that the ability to build relationships with the consumer is important in consumer trust in the sector.<br><br>It was pointed out that building trust requires a lot of patience and a lot of humility. **Talks with the client and the consumer are needed.** Particularly important for the consumer is the fact that there is a producer behind the product - a man who is emotionally | **The information campaign, recalling the pros of supporting Polish production**, brings results. Consumers are wondering how to buy locally. Consumers verify a small producer - he will lose more than a large producer. | The desired direction in advertising is to show the production process (food producers, farmers) and services provided (restaurants, catering). In the responses, there was a suggestion of an understandable and straightforward communication supplied to consumers. | The participants of the meetings noted that the ability to build relationships with the consumer is vital in consumer trust in the sector (relationship building as part of marketing).<br><br>Marketing campaigns are helpful for consumers. They help consumers to choose products from a wide range. At the same time, consumers are aware that it is a companies' promotional activity and it may be intentionally misleading the consumer.<br><br>It seems that particularly good |

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| | companies, influencers). | connected with his product.<br><br>In the case of stores selling food, the relationship with the customer is very important, which is already created when the **customer enters the store**. It was noted that the customer is entering the store and letting someone smile pleasantly, this has a positive effect on the customer.<br><br>In the case of food producers, it is crucial to apply the principle of **"try, see, touch"**. For this purpose, some food producers, for example, open fair stands where dishes are prepared by professional chefs from given raw materials, semi-finished products sold by a given company. | | | communication with the consumer is to bring him closer to the given company, to show the production processes that are used in food production.<br><br>Representatives of enterprises have quite the same point of view. Basically, they will realise that customer contact is essential. It works best in retail stores, where this contact is usually direct. Moreover, it is important to show the product to the consumer and have him try the product. |

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| **Perceptions of crisis/scandal management and how it impacts trust** | **The role of the media** in controlling food manufacturers was emphasised by some focus study participants regarding food safety and trust-building. While some consumers in publicised food quality scandals saw **the weakness of the government** in controlling compliance with procedures, others saw such information as evidence of the proper functioning of control bodies (if there is information about irregularities in a particular industry, it means that the control body is functioning properly).<br><br>At the individual level (daily practices), irregularities and quality problems in the case of a particular actor in the supply chain result in **the stopping of purchasing his products**. However, a problem with a certain product category (e.g. meat in a grocery store) does not result in a lack of trust in the **retailer**, but in **the stopping of buying a certain sort of products** from them. | The respondents pointed out that temporary crises are undoubtedly a threat to building trust. But it is indeed **temporary** because often the consumer quickly forgets about the crisis and returns to the daily routine. The motivator for this return is the **low price**, and very often also the **curiosity and inquisitiveness of the causes and effects** of the image mentioned above crisis (not to be confused with the current pandemic situation). | Quite visible concerning the food sector is the principle of **limited trust for suppliers**. It is the effect of many food fraud scandals in the last years.<br><br>The COVID-19 case shows acceptable management practices in the food sector. Primarily there has been a change in part of the organisation of work in processing. The Polish food industry has proved itself, and it was able to increase production, was able to supply markets and grocery stores. | N/A | Consumers see the problem of crises in the sector through the prism of the importance of the role of the media and the government. Discouraged by the occurrence of irregularities, consumers usually temporarily resign from the purchase of a given product.<br><br>On the one hand, representatives of the sector are aware of the damaged reputation of the sector, as a result of numerous scandals in Poland and other countries. At the same time, however, they realise that even after such challenging crises, consumers, if tempted by a better price or a promise of better quality and greater product safety, are slowly becoming back to buying a given food product. Industry officials also point out that the COVID-19 situation has shown how well the sector has dealt with the new crisis.<br><br>The respondents pointed out that temporary crises are undoubtedly a threat to building trust. But it is indeed temporary because the consumer often quickly forgets about the crisis and returns to the daily routine. The motivator for this return |

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| | | | | | is the low price, and very often also the curiosity and inquisitiveness of the causes and effects of the image mentioned above crisis (not to be confused with the current pandemic situation).<br><br>The pandemic was undoubtedly an excellent basis for crisis management. It is shown, among other things:<br><br>- The pandemic has shown that in any crisis, the aspect of trust is key. And although it is difficult to talk about what is most important for the consumer in the times of COVID-19, there are trends regarding, among others, increasing the importance of proximity, producer and product locality. We can also see that consumers are looking for information and signs that show them that they can trust a product.<br><br>- Industry representatives noted that, on the one hand, consumers in the times of COVID-19 must eat as usual, but during the pandemic, customers turned to products with higher quality values. The increased interest in organic production and organic food is particularly visible. In other |

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| | | | | | words, people began looking for alternatives to the pharmaceuticals they take, in the form of just buying and consuming high-quality food.<br><br>- It was pointed out that showing consumers the information that a given company has ensured the continuity of production translates into unchanged availability of products on the market and could significantly increase trust.<br><br>- Another alleged positive effect of the pandemic, influencing the excellent perception of the company, and thus the increase in trust, may be various types of initiatives, such as donating products by producers to hospitals or other organisations that asked for help. |
| **Perceptions of sustainability and how it impacts trust** | **Sustainability** was not seen by the focus study participants as an important element of the process of increasing trust in the macro context.<br><br>Respondents perceived sustainability to a greater extent through the prism of the level of | Market leaders are increasingly focusing on consumer trust and deepening, developing this aspect, which is reflected, among other things, in building relationships with the consumer, e.g. based on the long-standing tradition of the company, or the implementation of | N/A | Rear animals to high animal welfare standards was indicated **as the first most important** action in order of importance in relation to trusting **farmers**. In the Delphi panel's open answers two problems were reported by the respondents: (1) | Perception of sustainability among entrepreneurs shows that there are more and more critical various aspects of food production related to sustainability, which should be manifested through the implementation of CSR strategies by food sector companies.<br><br>Consumers instead discern specific |

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| | micro, individual benefits.<br><br>They prefer local products, directly from the farmer or with a short supply chain and as few additives as possible.<br><br>**Animal welfare** was seen in the context of individual choices to reduce meat consumption (diet motivated by awareness and well-being).<br><br>The COVID-19 outbreak made respondents prefer packaged products (thus safer and less awareness for plastic pollution). | the corporate social responsibility strategy, i.e. CSR).<br><br>According to the participants of the meeting, the CSR should be an inseparable element of company management in line with the principles of company strategy. Examples such as responsible and sustainable production, reliable communication, paying attention to social aspects, building relationships and environmental protection.<br><br>Consumers are increasingly paying attention to issues closely related to **sustainable and responsible production**, or even more broadly, to the **sustainable operation of enterprises**. It is indicated, among others, by the fact that certifying companies | | harmful spraying, artificial fertilisers and artificial feeds instead of own products in the case of **farmers** and (2) artificial, cheaper substitutes and preservatives in the case of **food producers**.<br><br>The respondents also emphasised environmental protection, reduction of plastics and use of natural resources and sources. On the issue of sustainability, there was noted the problem of decent wages for employees and unsustainable production, advocating zero waste and ingredients in menus that can be prepared in many ways to reduce food waste.<br><br>Consumers would also | aspects of sustainability of the production of food as, e.g. animal well-being, and local production of the food.<br><br>Sustainability is beginning to be perceived by consumers in the context of trust. But it is still a low-awareness level in consumer perception. On the other hand, the perception of this by industry experts is gaining more and more importance, which means that the market, and thus the consumer, "report" a demand in this area.<br><br>So an important aspect is:<br><br>- very diligent tracking of all legal provisions - very important thing, as failure to comply with the law may lead to a decline in consumer confidence;<br><br>- very urgent and reliable quality control. |

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| | | conduct research focused on the recognition of the certification mark by consumers, that is, how and whom consumers trust (e.g., Fairtrade). | | like to be able to choose animal products from **farmers** who do not cause unnecessary pain to animals. | |

Some Key Insights from the GAP Analysis:

There is a consensus across all groups on the following topics:

- There is general agreement on the importance of better understanding the trust in food approach, and introducing confidence-building initiatives; furthermore, there is a belief that there are too few initiatives that would increase consumer trust in the food supply chain.
- There is a need for initiatives at meta-level, which would build consumer trust in the FSC.
- Greater access to reliable information and transparency of rules has a positive impact on the level of trust.

There is divergence on the following topics:

- Judging food actors by other values: consumers look through the prism of their own experience, personal acquaintance, and the industry more positively assesses those actors who are subject to state control.
- Consumers do not trust control systems or trust them “because they have no other choice”, the industry assesses control bodies positively (knowledge of control mechanisms may be a differentiating factor)
- Difference in approach/trust in expert opinions. Consumers have less trust in those who may have an interest in providing false information (both commercial operators and government).

- The representatives of the food sector pay more attention to the broader context of different aspects of food production (e.g. food safety, food quality), especially the conditions and rules of food production as well as legal regulations.

# Implications for future EIT projects and implications for industry

| Categories | GAP ANALYSIS<br><br>(Summary of key points) | Implications for future research (e.g. EIT funded work within this grand challenge in years to come) | Implications for industry actions to improve consumer trust (e.g. which type of activities may be beneficial, what type of communication campaign) |
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| **Perceived trust in supply chain actors (farmers, manufacturers, retailers, governmental bodies)** | The concept of trust in actors in the food supply chain is not well established in Poland. For this reason, consumer confidence is often based on a 'blind' belief/confidence and a 'need' for confidence, and not on conscious confidence-building, shaped by information and education. As a consequence, an insufficient level of information, knowledge and education leads to a lack of trust. The studied material shows the need expressed by various actors (consumers, food industry representatives, food industry experts) for more initiatives that build consumer trust. | Understanding the impact of the process of building consumer confidence in the food supply chain through various initiatives on trust and attitudes towards individual actors.<br><br>A better understanding of what consumer confidence in the food supply chain means (through which factors behaviour manifests itself, what expectations are) and what consumer confidence in the food supply chain means, and then filling this gap through information campaigns based on reliable information and independent actors, aimed at achieving mutual understanding. | Building confidence in government actors and state actors in the food supply chain. Explaining the role of the state and transparent confidence-building measures.<br><br>Creating platforms for multidimensional cooperation between different actors (industry, state, consumers, etc.) in building confidence-building initiatives in the food supply chain. Cooperation based on partnership and common interest.<br><br>Developing communication campaigns run by trusted actors, bringing closer the principles of food safety. |

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| | | | Explaining the role of state organisations in controlling food safety and quality.<br><br>Strengthening the focus on building positive media coverage of the good practices of actors in the food supply chain.<br><br>Cooperation between the industry and the social environment on better responding to consumer needs. |
| Perceptions of food safety, food quality (and its ingredients) and its impact on consumer trust | Food safety and food quality have a major impact on consumer confidence in actors in the food supply chain. This is linked to the need, expressed by the participants in the study, to control food quality and to provide reliable information on industry practices (production, cultivation, animal breeding).<br><br>There is growing trust in organisations and control/certification systems. The problem reported in this case is unfair industry practices (including unreliable controls) and 'worthless' certificates. | Understanding the reasons (social, cultural, psychological factors) for building trust in food in the terms of safety and quality in individual countries and consumer groups. | Developing guidelines for accurate communication of food composition (allergens, eco-, vegan), certificates and origin of food.<br><br>Clarifying the role of food control institutions in the process of communicating irregularities and developing an information system based on trust and positive communication (tracking the case and reporting on the elimination of irregularities by the producer).<br><br>Creating a communication platform for consumers to express their concerns and communicate with actors in the food supply chain. |

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| Perceptions of transparency and its link to consumer trust | Both consumers and industry experts expect transparency in the food supply chain. Integrity, credibility and authenticity are the basis for building trust. However, these are not always features that consumers see in the practices of food producers. The analysed material showed the need to build practices based on transparency. | Measuring the impact of initiatives based on the transparency of processes on consumer trust (in relation to food producers and retailers).<br><br>Measuring the impact of government and public organisations' transparency controls on consumer trust in food and the food supply chain. | Creating initiatives based on strengthening transparency (e.g. access to information on the origin of ingredients, production process, transparency of marketing practices).<br><br>Promoting the cost-effectiveness of transparency and its translation into financial results and the visibility of food industry actors. |
| Perceptions of locality and its link to consumer trust | Consumers have more trust in local producers, farmers and companies with Polish traditions and origins. They also appreciate certificates, but they see a problem with the fairness of the certification system. Consumers would like to have access to reliable information about the origin of food products and raw materials used in the production process. | The importance of locality in building trust in the food supply chain.<br><br>The impact of the COVID-19 pandemic on building recognition and confidence in local products and producers.<br><br>Local products and contemporary eating behaviours of consumers. | Building an independent and reliable certification system for regional and local products.<br><br>Better information on the origin of products.<br><br>Creating initiatives that increase the availability, promotion and visibility of local products.<br><br>Working with local communities to build a responsible business that responds to community needs. |
| Perceptions of traceability and its link | Consumers agreed on the importance of being able to trace food and its ingredients back to their source and origin, especially for farmers. They also expressed the need for action in this area in | The impact of initiatives that increase the traceability of products on the level of trust (especially among farmers, restaurants and | Initiatives based on cooperation with actors in the food supply chain for increased traceability through applications, websites, more accurate |

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| to consumer trust | the context of increasing food safety (e.g. lack of additives) and the possibility of choosing local products. The problem was the resale of the products - it is impossible to trace the product and verify the veracity of assurances that the farmer is selling his own products. | catering). | labelling and social campaigns.<br><br>Pressure on actors in the food supply chain to build responsibility for the traceability of their products. |
| Perceptions of communication and information sharing (education, raising awareness, labelling) and its impact on trust | The information sharing was seen by respondents as an important aspect of building trust in actors in the food supply chain. Transparency of labels and their compliance with the facts was important for the participants of the focus study. The lack of appropriate information on the label was perceived as unfairness or a desire to conceal unfair practices.<br><br>Consumers saw the sharing of information (producer-consumer and consumer-consumer) as an initiative worth considering. Among the proposed actions, information campaigns on important aspects, such as food safety, were also mentioned. | To investigate the role that consumer pressure to share information and communicate more transparently plays in providing more effective consumer education/campaigns aimed at increasing consumer trust. | Creating platforms where consumers can communicate with actors in the food supply chain to improve their knowledge, verify information and exchange suggestions.<br><br>Examining how crises in the food industry and the way they are communicated affect consumer trust in the food supply chain.<br><br>Application of the "closer to the consumer" approach in large food sector enterprises. |

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| Perceptions of marketing practices and how it impacts consumer trust | The respondents noted that the ability to build relationships with the consumer is important in consumer trust in the sector (relationship building as the part of marketing). Some participants of the focus study considered marketing techniques positively (advertising, participation of media experts and celebrities in product promotion). They stated that it helps them to choose products from a wide range. However, some respondents admitted that they do not trust marketing techniques because experts are paid and therefore untrustworthy. The forms of paid cooperation were particularly negative (celebrities with contracts with food companies, influencers). | Investigating what consumers want to see in food companies advertising and marketing activities.<br><br>A deeper understanding of how consumers perceive food marketing campaigns. | Conducting campaigns that promote values that are important for consumers, related to trust in food (local, origin, quality, etc.).<br><br>Learning from the food industry's or other industries' best marketing/advertising practices. |
| Perceptions of crisis/scandal management and how it impacts trust | The respondents pointed out that temporary crises are undoubtedly a threat to building trust. But it is indeed temporary, because the consumer often quickly forgets about the crisis and returns to the daily routine. The role of the media in controlling food manufacturers was emphasised by some focus study participants in regard to food safety and trust building. While some consumers in publicised food quality scandals saw the weakness of the government in controlling compliance with procedures, others saw such information as evidence of the proper functioning of control bodies (if there is information about irregularities in a particular industry, it means that the control body is functioning properly). | Investigating which types of issues impact consumer trust for a shorter period of time and which types of issues are considered as major incidents for consumers; and whether there are any cultural differences in redlines (which are not to be crossed) for consumers in different markets.<br><br>Investigating how to best communicate with consumers about a crisis so that the reputation of the organisation is not jeopardised.<br><br>Investigating how organisations can recover from large-scale major scandals and rebuild trust with consumers. | Creating a reliable system of information about crises in the food industry, based on independent institutions. Such a system would inform about the further fate of irregularities, thus allowing consumer trust to be restored.<br><br>Showing the sources of crises in the food sector from the perspective of producers, government and consumers, which will allow for a better understanding of their specifics and their influence on consumer trust. |

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| Perceptions of sustainability and how it impacts trust | Sustainability starts to be seen by consumers in the context of trust. However, it is still a low level of awareness in consumers' perceptions. On the other hand, the perception of sustainability by industry experts is becoming increasingly important, which means that the market, and thus the consumer, is 'putting the demand' on the table. | Factors affecting the growing role of sustainability in consumers' perception of trust.<br><br>Understanding the cultural differences in perception and priority of sustainability in various markets.<br><br>Investigating how to best raise awareness of the priority of sustainability in markets where the baseline of quality, health, and safety is not met yet.<br><br>Understanding which aspects of sustainable development attract particular attention of food consumers. | Carefully following the legislation and adapting its practices (particularly important in the context of farmers).<br><br>Quality and compliance control, carried out by an independent organisation, and reliable information to consumers on the results of controls.<br><br>Developing a rating system for ethicality of manufacturers and food producers (similar to the hygiene ratings for restaurants).<br><br>Educating consumers in the field of sustainable food production. |

# How can the insights of the report inform the planned crowd ideation

- **Which gaps could possibly be filled through a communication campaign?**

Perceptions of communication and information sharing (education, raising awareness, labelling), its impact on trust, as well as perceptions of transparency and its link to consumer trust, can be addressed through a communication campaign.

Understanding of trust in food from consumers and actors of the food supply chain points of view.

Showing what features an ethical food company has.

- **Which 1 or 2 potential industry actions (including communication campaigns) may benefit significantly from crowd ideation?**

*For actions related to communication and information sharing:*

1. Determining how to get consumers involved and how to communicate their role in the co-creation process best.
2. Determining how to use the science of behaviour change best and how to design campaigns that draw upon the science of behaviour change.

*For actions related to traceability:*

1. Determining the potential use of blockchain technology in traceability initiatives and/or working with start-ups that have food supply chain traceability in their agenda/business plan.

*For actions related to sustainability:*

1. Developing a rating system for ethicality of manufacturers and food producers (similar to the hygiene ratings for restaurants).

# Country-level Gap Analysis – Italy

This activity has received funding from EIT Food, the innovation community on Food of the European Institute of Innovation and Technology (EIT), a body of the EU, under the Horizon 2020, the EU Framework Programme for Research and Innovation

| **Deliverable** | |
|---|---|
| Title: | Country-level gap analysis - Italy |
| Type of Deliverable | R: Document, report |
| Authors: | Tiziana Andina, Fausto Corvino, Veronica Roldan, Anna Miglietta |

# Executive Summary

The purpose of this document is to compare the results of parallel studies conducted in Italy on consumers on the one hand and industries on the other in the agri-food sector on the issue of consumer trust. This in order to conduct a gap analysis that provides clear indications of the differences of opinion between the two groups and offers companies useful suggestions and strategies to bridge this gap and strengthen the relationship of trust with consumers. After a brief introduction in which we explain what kind of studies we have carried out, part 3 of this document proposes the gap analysis. Part 4 explains how the gap analysis sets the basis for a new research cycle and what useful guidance companies can draw from it. Finally, part 5 illustrates which points of the gap analysis can be useful for a crowd ideation

# Introduction

In the first year of this EIT Food Grand Challenges project (2020), Italy conducted 6 focus group [+ one Pilot focus group] and a Delphi survey with consumers, one workshop with industries and academics working on food issues and 6 interviews with industry representatives.

Focus group were then carried out through videoconferences in the period May 4th - May 14th 2020. They had an average duration of 2 hours 30 minutes with the exception of the Pilot that lasted in 2 hours, and they involved a total of 34 participants (F= 18, aged 30 -74 years; M = 12, aged 23- 66 years) recruited through a marketing service agency. All focus groups were moderated by Verónica Roldán and Anna Miglietta.

The industry workshop took place on June 30th, 2020. It was attended by 16 participants. Nine of them were representatives from food industries (5 from big companies and 3 from small farms), 4 were academics, 2 were food journalists and one was an ethical banker. The workshop was introduced by Tiziana Andina and chaired by Fausto Corvino.

The interviews were conducted by Verónica Roldán in June 2020. Interviews lasted between half an hour to one hour. Regarding sample characteristics, 1 interviewee was from a farmer association, 1 from a retailer association, 1 from a producer association, 1 from the media industry and 1 interviewee was a Ngo representative that participate in the national consultant agency on food safety .

# Country-level gap analysis

[Complete the table in relation to these categories, comparing findings from the focus groups, industry workshops and industry interviews. Please note: it may not be possible to fill all the boxes/categories, it will depend on the findings per country. Please adapt categories as required].

| Categories | Consumer Focus group finding | Industry Workshop finding | Industry Interview finding | Consumer Delphi survey findings | GAP ANALYSIS |
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| **Perceived trust in supply chain actors (farmers, manufacturers, retailers, governmental bodies)** | Most participants place more trust in large retailers selling branded products. They prefer them both to smaller stores, which obviously offer less choice, and to discount stores, which force an excessively downward compromise on quality. Some participants, however, while recognizing the validity of the above reasoning, believe that even more reliable than the large retailers are the neighbourhood | Among all chain actors, farmers are those that experience the higher degree of trust. This is often associated to the perception, that farmer do the hardest job, are paid less than the other agents, both relatively and in absolute terms. Moreover, the majority of participants think that farmers are usually exploited. Big manufacturers have often been accused of maximizing their profit at the expense of consumers and local | N/A | A Delphi survey of Italian consumers suggested that amongst the main actors in the food supply chain people **trust farmers the most**. Food retailers were the next trusted actors, followed by food manufacturers and food service providers (e.g. restaurants and catering), whilst government authorities were least trusted. It must be noted, however, that in Italy does not exist a National Food | Both consumers and producers seem to agree that farmers are the most reliable players in the food chain, and often the weakest and most exploited. A clear gap emerges instead with respect to trust in other actors. Consumers are substantially split between those who place greater trust in the big brands and those who trust the neighbourhood markets the most. Industries, on the other |

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| | markets, usually in the open air, which in Italy are present in almost all cities, even in the smallest ones. As far as producers and farmers are concerned, the participants are divided between those who place more trust in producers with a long history behind them, as they are considered more capable of managing raw materials, and those who instead have more trust in small farmers, as they make the opposite reasoning to the former and believe that smaller means more reliable. There is also widespread trust among consumers in the control authorities and certification and labelling bodies in Italy | communities. One point on which there has been enough discussion is the use of raw materials purchased abroad by big manufacturers, with a loss of income on the part of local farmers. Retailers have been less central in the discussion, but we can say that in terms of trust they occupy an intermediate position between farmers and producers. | | Authority | hand, believe that small retailers have a clear advantage in terms of trust over larger players. In general, we could say that consumers place much more importance on the history and credibility of the brand than industries do. |

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| **Perceptions of food safety, food quality (and its ingredients) and its impact on consumer trust** | The main reason for concern on the part of consumers are antibiotics, fertilizers and the law quality of raw materials. The latter is also the reason why some of the participants express low trust in public canteens. In general, the majority of participants believe that big retailers offer a basic guarantee on food safety. | During the workshop it was discussed several times that giving trust to those who sell us food is a gesture of great courage, because it is as if we put our health in the hands of someone else, in many cases unknown. The safety of food has therefore emerged as central to building the relationship of trust. This is also with respect to the Covid-19 problem, regarding which industries believe that the sector has reacted well and that consumers have appreciated the seriousness and professionalism of the industries in managing the risks of the health crisis. | The majority of the interviewees think that producing and selling good quality products is a necessary condition for building trust. However, some also stress that we would be wrong in equating people's claimed desire for high quality products with their actual desire, because the majority of people, although demanding it, are unable to evaluate the quality of the products they purchase. On this same line, one of the interviewees holds that consumers' demand of high-quality products simply translates in the demand for expensive products. | N/A | Both consumers and industries believe that the safety of food is, together with quality and transparency, one of the main drivers of trust. Consumers believe that the main guarantee of food safety is provided by large retailers. And this is in line with what companies claim, that although safety is one of the main demands of consumers, they are not able to judge for themselves the safety of the product they buy. In this sense, large retailers appear to be the guarantors of food safety, like those to whom consumers delegate the choice of healthy, non-hazardous products. |
| **Perceptions of transparency and its link to consumer trust** | Participants consider as highly relevant for trusting chain actors their overall reputation, | Both small and big producers and retailers that took part in our workshop agree that | Only some of the interviewees mention transparency among the drivers of trust. And | The findings of the Delphi survey showed that **transparency and traceability are the two** | Both consumers and the industries that participated in the workshop agree on the |

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| | which consists in multilevel accountability. Accordingly, reputation is associated by participant to a good customer service and to a transparent communication. With regards to the latter, participants believe that chain actors can be considered as transparent when they communicate externally in a complete way both the raw materials and the production steps that lead to the final product. | transparency is a key driver of trust, probably the main one. Yet, small actors tend to identify transparency with a direct contact with consumers, hence they maintain that there exists a sort of relationship of inverse proportionality between the size of the actor and its ability to build trust with consumers. Conversely, big actors hold that the history and the credibility of the brand is the main guarantee of transparency, and this represents a substantial advantage in terms of trust. | when they do it, they usually mention trust only behind other factors, as for example quality, safety and price. | **most important actions** in relation to **trusting food manufacturers**. | centrality of transparency in the relationship of trust. However, this clashes with the fact that very few of the industries interviewed mentioned transparency. Apart from this, a substantial difference lies in the fact that consumers often believe that a necessary condition for transparency is direct contact with companies, both in real form and through digital media (videos, interviews, documentaries, etc.). In contrast, industries do not give much importance to direct contact and believe that transparency is expressed in a sincere and complete communication of product quality. |
| **Perceptions of locality and its link to** | Participants split into two groups. Some | Small producers and retailers, which are also | Locality does not play a central role in the | Using local produce is the **second most** | Both consumer and industry analyses reveal |

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| **consumer trust** | believe that having an extensive trade network, both nationally and internationally, is a guarantee of quality. Others, on the other hand, remain tied to local products, sometimes even the products of their place of origin, which may be different (for work reasons) from the place of residence. | the ones that tend to be more local, believe that acting in a local context, using raw materials from the region and minimizing distances between farmers, producers and retailers, creates greater consumer trust. The big actors, on the other hand, insist that operating in a global context helps to obtain the best raw materials at a lower price, and the same goes for production processes, and therefore they claim that this creates an advantage in terms of trust over more local actors. | interviewees. Only one of the interviewees mentions the locality of products as an indicator of quality, but then going on with the interview, it is clear that more than the geographical origin of the product, the interviewee refers to a handcrafted process. | **important action** in relation to trusting **restaurants and catering** in the Delphi survey. However, it is also implied in the importance of traceability for respondents, as traceability has been chosen as the second most important action in relation to building trust with food manufacturers and farmers, and the third for trusting restaurants and catering. | an internal gap between those who believe that the location of products, or at least raw materials, is a determinant of trust, and those who believe that it is much easier to place trust in large companies that operate in a global context and can implement complex product quality control mechanisms. |
| **Perceptions of traceability and its link to consumer trust** | According to the participants, traceability is one of the main vectors of trust, but chain actors are currently not doing enough in this regard. Consumers therefore | The issue of traceability has been mainly addressed as consumers' ability to filter and interpret food information coming from other actors and the media. Most of the | Even if traceability does not appear directly in the interviews, often when interviewees talk about the importance of the label, they implicitly refer to the origin of the raw | Traceability has been chosen as the second most important action in relation to building trust with food manufacturers and farmers. Traceability is the third most | Both consumers and industry recognise the importance of traceability and agree that there is a perception of poor traceability of products. However, there is a |

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| | invite producers to provide more information about the geographical origin of products, for example, clearly stating whether they use Italian raw materials or not. In this regard, consumers welcome all those initiatives that aim to increase the traceability of products, from additional information conveyed through producers' websites, to video contributions and direct visits to factories. | participants agreed that product traceability can only be effective in consumption choices with respect to consumers who have developed a food culture. Some therefore argued that more should be invested in food culture. This could be done by public institutions , the media, and also by private actors who could, for example, invest in master's degrees in food education, thus supporting the public sector. | materials, the way they are treated and the possibility of obtaining all this information from the label. | important action for trusting restaurants and catering. | clear gap about the origin and causes of this perception. Consumers believe that other actors in the food chain are not doing enough in terms of traceability. Industries, on the other hand, attribute the lack of awareness of consumers' inability to assimilate and understand the sometimes complex information that industries convey to the outside world, primarily through labels. |
| **Perceptions of communication and information sharing (education, raising awareness, labelling) and its impact on trust** | According to consumers, companies still do too little compared to communicating a clear and sincere image of what happens inside. And this certainly creates a lack of confidence. According | Almost all participants agree that it is easier to build up a real and durable relation of trust with educated consumers, i.e. consumers who deepen their knowledge of agri-food issues and are able to process the | Only a minority of respondents mention communication between the factors that create trust between consumers and other actors in the food chain. Those who do so refer mainly to the importance of the | N/A | According to consumers, industries do too little to present themselves in a truly transparent way, and in this sense a series of technological integrations (codes to be scanned, interactive websites, etc.) could |

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| | to some, a label that meets the legal requirements is not enough to create a strong relationship of trust, and it is therefore necessary that companies provide additional information (some suggest, for example, through the use of scannable codes on product packaging), others even go so far as to postulate that consumers must be included in business decisions. Costumer service also plays an important role, and consumers believe that it should be strengthened and made easier for customers to reach. | information, more or less technical, present on the label and/or on websites. Many participants stressed, however, that in order to have a good communication about food, it is necessary to trust the media and to pay attention to the difference between serious, official and intellectually honest journalism and food blogging, which can be partial, inaccurate and biased. Some participants also added that industries should insist on the emotional value of food. Our relationship with food is not just cognitive, but also emotional. Food should not be just presented as non-toxic, harmless, and safe, but also as something that is connected to our shared cultural identity | label as a means by which the company can reduce the perception of risk in consumers. According to some, one way to further increase consumer trust is to find ways to help them understand the information on the label so that communication is effective. | | help. Industries, on the other hand, believe that it is difficult to convey full information to the outside world, and therefore be transparent, if consumers do not develop a real food culture. |

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| | | and could make us feel better. | | | |
| **Perceptions of marketing practices and how it impacts consumer trust** | Consumers are wary of any marketing practice that vehicles messages that do not reflect the practices and quality of companies. More specifically, the vast majority of consumers do not trust the food media, such as journalists, celebrity chefs, bloggers, websites. These actors are perceived as non-transparent and driven by profit motives that go against the quality and safety needs of consumers. | Most participants believe that marketing in a sincere, clear and serious way is the right strategy to gain confidence in the medium and long term. Many, in fact, explained that during the first dramatic wave of Covid19 in Italy (in spring 2020) they preferred to keep a low profile and project an image of seriousness to the public. | In all interviews, successful marketing is always associated with the concept of quality. At the same time, however, some respondents say that the media can be a double-edged sword for companies in the agri-food sector, because they can create alarmism and fear, and thus erode consumer trust. | Italian consumers rate **honesty labelling** as the **third most important action** for **food manufacturers** in order to build trust. Honesty in advertising and marketing practices is ranked as third for building trust with retailers. | Both consumers and industries agree that marketing helps to build a relationship of trust, but it cannot replace product quality, it can only help to better convey this quality communication. |
| **Perceptions of crisis/scandal management and how it impacts trust** | N/A | All participants agree that, net of everything else, an ethically responsible company is much more likely to gain consumer trust than a company that | N/A (see the following box) | N/A | N/A |

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| | | indulges in practices perceived as unfair, e.g., ignores local stakeholders, exploits and abuses workers, and violates environmental regulations. Thus, we can say that everyone agrees that social and environmental scandals are serious obstacles to trust. | | | |
| **Perceptions of sustainability and how it impacts trust** | Sustainability is also important to build a relationship of trust with consumers, even if less than the quality and safety of the products. Consumers' attention is focused, on the one hand, on the impact of waste materials and waste on the environment and, on the other, on the welfare of the animals involved in food production. In a way, consumers seem to see the commitment to | It has been mentioned several times and discussed the role of critical shareholding and non-governmental organizations as an effective leverage to erode trust in companies. Many examples have been made of companies in the food supply chain that have suffered considerable loss of reputation following attacks by associations and consumer groups on issues related to | Sustainability and ethical responsibility of companies play a decidedly secondary role in the interviews. The few who refer to it do so to say that even though today everyone talks about the environment and business ethics, consumers are not interested in these things, they are only interested in the fact that the product is safe and of good quality. | The Delphi survey highlight that Italian consumer attribute the task on environmental sustainability to farmers and retailers at most.<br>Assuring high **animal welfare standards** and **support the environment** are rated respectively as first and third most important actions for building trust with **farmers**. **Reducing waste** emerged as the most important action in | Consumers claim to pay great attention to environmental sustainability and ethical responsibility of companies (with particular reference to waste management and the welfare of animals involved in production processes). Industries, on the other hand, tend to be very skeptical about this and believe that consumers are not primarily interested in whether a company is more or |

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| | sustainable production as a sign of seriousness and reliability. Among the cross-cutting references to sustainability we signal: general concern for the environmental impact of animal breeding (both for intensive breeding and animal welfare), farming, sea pollution (mercury), plastic packaging; need to recycling/reducing plastic and wasting; preference for local 0 km products (also for the reprise after Covid) | land-grabbing and the way companies appropriate and use raw materials. | | relation to trusting **retailers** | less sustainable and/or ethical, but only that it produces safe and quality products. |

- POSSIBLE INCLUSION OF COUNTRY CONSUMER DELPHI RESULTS SUMMARY TABLE AROUND HERE*-

*Possible Inclusion of Table of Results from the Consumer Deplhi Survey (yet to be completed by the EIT working group). These results will provide high-level (summary) quantitative data from consumers about some of the categories listed in the table above. E.g. % of consumers who have high, medium or low levels of trust in the supply chain; % of consumers who think transparency is an important issue driving trust, etc. A table will be provided by the Consumer Delphi Team, for each country, when it is available. It is intended as supplementary data.

[Discuss the table(s) in 1-2 paragraphs]

# Implications for future EIT projects and implications for industry

[As with the previous section table, please note you may not need to fill all the boxes/categories. Furthermore, some of the implications might simultaneously fill multiple gaps, please feel free to merge categories/amend as required].

| Categories | GAP ANALYSIS<br>(Summary of key points) | Implications for future research (e.g. EIT funded work within this grand challenge in years to come) | Implications for industry actions to improve consumer trust (e.g. which type of activities may be beneficial, what type of communication campaign) |
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| **Perceived trust in supply chain actors (farmers, manufacturers, retailers, governmental bodies)** | Consumers pay much more attention to the history and credibility of brand than the industry thinks. in fact, the latter believe that consumers are more interested in the locality and craftsmanship of the products.<br><br>Farmers are perceived by all as reliable actors, but at the same time as the weakest and the most exploited ones. | Better understanding what consumers mean by trust and why they tend to have more trust in public control bodies than in other private actors in the agro-food chain.<br><br>Further extending the research sample to large Italian industries to verify the results obtained so far.<br><br>Investigating the reasons why the food media, at least the Italian ones, are unable to establish a real relationship of trust with consumers and how food culture initiatives could help to bridge this divide | Small companies should invest more in their brand, providing a guarantee of quality and safety, and rely less on direct contact with consumers.<br><br>Companies could show honest and fair behaviour with farmers, both through advertising campaigns and in the choice of raw materials, giving priority to local farmers.<br><br>Consumers want more clearer and more comprehensive information/labels; direct contact with the production process; factory visits |

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| **Perceptions of food safety, food quality (and its ingredients) and its impact on consumer trust** | Both consumers and industries believe that the safety of food is one of the main drivers of trust, and they agree that the main guarantee of food safety is provided by large retailers | Understanding why Italian consumers tend to have little or no trust in smaller producers and retailers.<br><br>investigate through which strategies the smaller actors in the food chain can create a solid relationship of trust with consumers, even if they cannot rely on the structures and control equipment of the big actors | The communication of the major players must insist on the complexity of their production and control structures, giving the consumer the idea that the product arriving at home has been selected, controlled and processed by people with high professionalism and great experience.<br><br>Small actors could indeed find benefit in shifting the focus of their communication from the craftsmanship and genuineness of their products to a professional, almost semi-industrial approach that transmits tranquillity to the consumer, especially in the pandemic phase we are going through. |
| **Perceptions of transparency and its link to consumer trust** | Although consumers believe that the big players are more reliable than the small ones, they are not willing to give up direct contact with producers and retailers (both in real and especially digital form), on the contrary they believe that this is a necessary condition for real transparency. Industries, on the other hand, do not give much importance to direct contact and believe that transparency is | Analyse the strategies through which consumers can establish a relationship of satisfactory transparency with the big actors in the food chain. | Organising, where possible, direct visits by consumers to companies and production plants.<br><br>Using websites and digital media to enable consumers to learn more about companies and to see and hear direct testimonials from workers and other consumers. |

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| | expressed in a sincere and complete communication of product quality. | | |
| **Perceptions of locality and its link to consumer trust** | There is a gap, both within the consumer and industry groups, between those who believe it is easier to have trust in those actors (both large and small) who use local products and those who imagine that there is greater trust in producers who select raw materials on the global market. | Deepening the issue of trust with respect to the use of raw materials of different origin. It might be interesting to understand what creates trust in both local raw materials and in those purchased on the global market. | Having recorded this split between the two groups on the subject, we believe that if well motivated both the local and global origin of raw materials can help to create trust. |
| **Perceptions of traceability and its link to consumer trust** | Both consumers and industry recognise there is a perception of poor traceability of products. However, consumers believe that other actors in the food chain are not doing enough in terms of traceability. Industries, on the other hand, attribute the lack of awareness of consumers' inability to assimilate and understand the information that industries convey to consumers | Testing the stance taken by industries and evaluating the impact of consumer's knowledge about food on the perception of poor traceability of products | Joining companies in information and training activities aimed at a consumer audience interested in learning more about the origin of everyday products. |
| **Perceptions of communication and information sharing (education, raising awareness, labelling) and its impact on trust** | According to consumers, industries do too little to present themselves in a truly transparent way. Industries, on the other hand, believe that it is difficult to convey full information to the outside world if consumers do not develop a real food culture. | Understanding the intensity of the link between food culture and trust.<br><br>Investigating what industries intend with food culture and developing proposals to encourage it. | Involving institutions and industries in initiatives that aim to create a food culture that goes beyond mere consumption by necessity and helps consumers looking at food as also an object of cultural and emotional interest. Some example might be food festivals, school courses that combine food with sustainability, video contributions accessible via web |

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| **Perceptions of marketing practices and how it impacts consumer trust** | Both consumers and industries agree that marketing helps to build a relationship of trust, but it cannot replace product quality, it can only help to better convey this quality communication. | Investigating through which marketing practices companies in the agri-food sector manage to convey the idea of creating quality products | Setting aside marketing practices that may give the consumer the impression of wanting to distract attention from the quality of the product (i.e., greenwashing, social-washing, etc.) |
| **Perceptions of crisis/scandal management and how it impacts trust** | N/A | N/A | N/A |
| **Perceptions of sustainability and how it impacts trust** | Consumers pay great attention to both environmental sustainability and ethical responsibility of companies On the contrary, industries, tend to believe that consumers are not primarily interested in whether a company is more or less sustainable and/or ethical, but only that it produces safe and quality products. | Analysing what effect the environmental and social responsibility of the company has on consumer trust in the Italian context | Showing consumers a strong attention to the environment, especially to problems related to waste treatment and compliance with national and European targets for the reduction of $CO_2$ emissions.<br><br>Showing attention to the interests of local stakeholders and also of workers. All this must be done with concrete practices and not only on a communicative level. To be more precise, communication must convey information of a concrete commitment |

# How can the insights of the report inform the planned crowd ideation

[Please share your ideas/thoughts on the following].

● Which gaps could possibly be filled through a communication campaign?

1) increase interest in the cultural aspects of food in order to create stimuli for consumers to become better informed

2) Increasing the perception of transparency of companies through digital resources (codes that can be scanned on product packaging, video contributions that can be used through the platforms or websites of companies)

3) Conveying the image of a truly ethical company, that does not aim to increase profits but also cares about the environment, workers and local communities – being careful not to give the impression of greenwashing or social-washing. This can be done in parallel with the other initiatives that aim to facilitate transparency.

● Which 1 or 2 potential industry actions (including communication campaigns) may benefit significantly from crowd ideation?

1) Thinking about forms of communication that can satisfy the need for transparency of consumers in all those cases in which direct contact is not viable – e.g. multinational companies, companies working on large scale, and so forth.

2) Helping small agri-food companies conveying an image of food security and quality, both through social media and through less traditional channels

## Country-level Gap Analysis – UK

This activity has received funding from EIT Food, the innovation community on Food of the European Institute of Innovation and Technology (EIT), a body of the EU, under the Horizon 2020, the EU Framework Programme for Research and Innovation

| Deliverable | |
|---|---|
| Title: | Country-level gap analysis - UK |
| Type of Deliverable | R: Document, report |
| Authors: | Niloofar Borghei Razavi<br>Irene Garnelo-Gomez<br>Kevin Money |

# Executive Summary

In the first year of this EIT Food Grand Challenges project (2020), partner countries have conducted a number of focus groups and a Delphi survey with consumers; as well as workshops and interviews with industry experts to gather insight on consumer trust in the food supply chain. The aim of this report is to bring together the insights collected through the abovementioned methods, to highlight the gaps between consumers' and industry's views on consumer trust in the UK. This gap analysis enables us to identify future initiatives and industry actions that can improve consumer trust in the food supply chain and its actors.

After a brief introduction, in which sample characteristics in relation to the four methods of data collection are summarised, the country-level gap analysis for the UK is introduced (Section 3). In Section 4, implications for future EIT projects and implications for industry in relation to the gap analysis are explored. At the end of the report, some potential ideas regarding the crowd ideation are proposed (Section 5).

# Introduction

The data for this report has been gathered through 6 focus groups (4 in the UK and 2 in Northern Ireland) with 24 members of the general public, 2 industry workshops with 9 participants in total, 8 interviews with actors from the food industry, and a Delphi survey with 369 responses from the UK (2199 respondents in total).

Overall, the **focus groups** had 15 female and 9 male participants. 10 out of 15 female participants were in the 18-40 age group, 4 were in the 41-60 age group, and 1 was in the 61-70 age group. Further, 11 female participants were responsible for shopping in the household and 3 female participants were not responsible for shopping in their household. Moreover, 4 out of 9 male participants were in the 41-60 age group, 3 out of 9 was in the 61-70 age group, and 2 out of 9 were in the 70-80 age group. Further, 4 out of 9 male participants were not responsible for shopping and 5 out of 9 of them were responsible for shopping in their household. Each focus group lasted for about 2 hours.

In the **industry workshops**, 9 participants shared their views and experiences in the sessions, 5 of them being employees of companies involved in the food supply chain (food processors and manufacturers), 3 of them being consultants (industry advisors) and 1 of them being a food journalist and a policy advisor for a wholesale/retail market (media/policy making). Participants hold positions ranging from CCO to R&D Director, Director of Strategy and VP of Communications in these organisations. For **industry interviews**, 8 interviews were conducted (both by members of the University of Reading and Queen University Belfast). Interviews lasted between half an hour to one hour. Regarding sample characteristics, 1 interviewee was from the media industry, 3 of them were government authorities, 1 was a semi-government authority, 2 were practitioners from food manufacturing companies and 1 of them was a food committee member in Northern Ireland. In the **Delphi survey**, from the 369 UK participants, 185 respondents (50.4%) identified as female and 182 (49.6%) identified as male.

In the next sections, we will first present the UK gap analysis and then we will discuss the implications of this gap analysis for future EIT projects and industry initiatives.

# Country-level gap analysis

| Categories | Consumer<br>Focus group finding | Industry<br>Workshop finding | Industry<br>Interview finding | Consumer<br>Delphi survey finding | GAP ANALYSIS |
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| Perceived trust in supply chain actors (farmers, manufacturers, retailers, governmental bodies) | The majority of focus group participants in the UK mentioned that they trust **farmers** the most, as they perceive the farmers to be the most vulnerable actors of the supply chain and believed that they are doing the best they can. However, issues like animal welfare and misleading terms like organic and free-range have the potential to damage consumers' trust in farmers.<br>Focus group participants mentioned that they trust **food manufacturers and processors** the least. Priority of profit-making, lack of transparency, and origin of the food and its ingredients contribute to this distrust.<br>Focus group participants mentioned that they do not fully trust **retailers**; however, this varied according to the reputation of the retailer.<br>The majority of participants trust **the government and regulatory bodies** as they regard these actors as enablers of trust in the rest of the supply chain and believed these actors have their hearts in the right place. | One group of workshop participants believed that **large organisations**, well-known brands and retailers' brands are more trusted by consumers, while acknowledging that once consumers lose trust, it will be very difficult to regain their trust. Another group of workshop participants believed that **smaller companies and food producers** as well as familiar brands are more trusted by consumers because of their familiarity and locality. Industry experts argued that consumers are more likely to forgive smaller producers when problems and scandals arise. | The interviewed food manufacturers and media experts believed that their activities and initiatives are useful in building consumer trust. Food manufacturers, however, mentioned that trust is not the centrepiece of their initiatives and is something that is derived as a by-product of their campaigns and communications.<br>Participants from governmental bodies highlighted that rather than informed-trust, consumers have blind-faith in food and food organisations, as food systems may be too complex to understand and verify for consumers. | A Delphi survey of 369 UK consumers (mean age = 52.49. S.D. = 15.052, with 50.4% identifying as female and 49.6% identifying male) suggested that amongst the main actors in the food supply chain people **trust farmers the most**. Food retailers were the next trusted actors, followed by food manufacturers and food service providers (e.g. restaurants and catering), whilst government authorities were least trusted. | Consumers' trust in the supply chain actors is likely to be based on blind faith and consumers need for trust rather than an informed trust shaped by information and education. Moreover, there is a gap between what consumers understand of trust and what trust means for practitioner and industry experts. Both consumers and experts from governmental bodies view regulatory and governmental bodies as enablers of trust for the rest of the supply chain. However, the finding of the Delphi survey contradicts this as consumers in the UK report the least level of trust in government authorities. Industry perspective is in line with the findings of the Delphi survey and to some extent the focus groups in regard to consumers' trust in retailers, however, it diverges from the findings of the focus groups in regard to consumers' trust in large organisations/manufacturers. |

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| **Perceptions of food safety, food quality (and its ingredients) and its impact on consumer trust** | The safety and quality of food and its ingredients were highlighted as important factors that affect trust by participants of the focus groups. Participants associated reputation with **higher quality** and argued that well-reputed suppliers offered products and produce of higher quality. Participants talked about the safety of food and its ingredients in relation to their vulnerabilities (e.g. allergy) and suggested that suppliers' attention to **safety** of products demonstrates their care and attention for consumers. | The baseline of **safety, quality, and health** was discussed in the context of the characteristics of the market and the priorities dictated by these characteristics by workshop participants. Industry experts mentioned that safety, quality and health are no longer among the concerns of organisations in the Western countries, as consumers in these markets are holding organisations accountable for **sustainability, fair trade, and environmental issues**. | Food and its **ingredients** were discussed in the context of product integrity by food manufacturers. **Safety and allergen** are also a priority in regulatory bodies' agenda. Both food safety and food quality emerged as important factors in the context of consumer trust in industry interviews. | N/A | Food safety and quality are still strongly associated with trust by consumers and governmental bodies. Further, consumers and governmental bodies still have their doubts about safety and quality even in Western countries. However, to some extent, the industry's assumption is that quality and safety are boxes, which are already checked by supply chain actors and there is no need to take any further actions in this regard in certain Western countries. |
| **Perceptions of transparency and its link to consumer trust** | Focus group participants associated transparency with **honesty and integrity** and highlighted that food suppliers (food manufacturers in particular) should be honest with consumers in regard to what goes on behind the closed doors of their factories, as well as in their labelling practices. Participants felt that food suppliers who had been transparent with them in the past and provided communication with consumers were more trustworthy, even if they had erred in the past. | Transparency was a dominant theme in industry workshops as participants highlighted that organisations should take the hard way, and yet **deliver what they promise** they will do to become more transparent. And even if they do not fulfil their milestone, they should be able to show their stakeholders/consumers that they are moving in the right direction. Participants also talked about the importance of **accountability and responsibility** in relation to transparency. | **Transparency and truthfulness**, in a supply chain that is global and complex in nature, was highlighted as crucial by industry interviewees from food companies as well as the interviewees from government and semi-government authorities. | The findings of the Delphi survey demonstrate that transparency is the second most important action in relation to trusting food manufacturers. While it is also implied in the **most important action**, which is **honest and accurate labelling.** Honesty about ingredients they include, and honesty about marketing and advertising activities are, respectively, second most important action for restaurants and third most important action for retailers. | The need for higher transparency of food manufacturers and processors have been highlighted in focus groups, workshops, industry interviews as well as the Delphi survey. From the industry perspective, there is the fear that transparency backfires, however consumers highlight that transparency is of importance even if actors have erred in the past. Transparency is implicitly present in the Delphi survey findings in regard to honest actions of retailers and caterers. |

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| **Perceptions of locality and its link to consumer trust** | Country of origin and locality of produce were also associated with trust in focus groups. Participants, especially within the Northern Ireland sample, were keen to purchase **locally produced** (Ireland or UK); as they felt they were supporting local businesses and the shorter food chain was fresher and more trustworthy. Participants highlighted that since the COVID-19 outbreak, they had become more aware of the importance of local producers and suppliers and they believed that local suppliers should receive more support. Participants stated their discontentment with seeing fruits and vegetables sourced from other continents in supermarkets. They argued that having access to all fruits and vegetables all year long, even when the produce is not locally in season, creates an irreversible expectation for these items to be always in stock. | The importance of locality was highlighted in the context of what food organisations can **give back to local communities**, in a food supply chain that is global in nature. Participants highlighted that with the industry's rush to prove locality and giving back to community, the trend in reshoring, in shortening the supply chain, in providing a local feel and look to consumers is undeniable. | Interviewees talked about the importance of local producers and highlighted their role, especially during a crisis like the COVID-19 pandemic. Interviewees from food manufacturing companies mentioned that as a result of the COVID-19 crisis, people may be **inclined to buy more locally**. | Using local produce is the **third most important** action in relation to trusting restaurants and catering in the Delphi survey. However, it is also implied in the importance of traceability for respondents, as traceability has been chosen as the third most important action in relation to building trust with farmers by Delphi survey participants. | Industry experts are more hesitant about the consequences of going completely local on prices, availabilities of products as well as brand identity. They believe that there should be a balance between going local and keeping the global standard. When needed, organisations can give back to local communities by employing people from a certain local community, for example. However, as a result of the COVID-19 pandemic, consumers who participated in focus groups and the Delphi survey felt the need for a local supply chains more than ever and feel the urgency in supporting local producers and farmers. |
| **Perceptions of traceability and its link to consumer trust** | Participants associated increased traceability (**farm-specific** rather than country-specific) with higher trust. | Traceability was not discussed by workshop participants. However, a number of workshop participants talked about the possibility of creating an **app that allows rating** suppliers and manufacturers based on ethics. | Traceability was mentioned both as a **current** initiative that a number of food companies are undertaking at the moment, as well as a recommendation for **future** initiatives. | For Delphi survey respondents, enabling traceability was highlighted as the **second most important** action in building trust with farmers. | Both industry experts and consumers agreed on the importance of tracing food and its ingredients to their source and origin, and both agreed that more can be done in this regard. Consumers went as far as requesting farm-specific on top of country-specific traceability. |
| **Perceptions of communication and information sharing (education, raising awareness, labelling) and its** | **Information accuracy and clarity** were of high importance for focus group participants. The accuracy of information shared on labels and packaging was associated with supplier's honesty and transparency. Similar to food | Industry experts elaborated upon the difficulty of **educating consumers** and bridging the attitude-behaviour gap in order to achieve positive behaviour change. | Communication and information sharing were highlighted as important for both the practitioners as well as consumers. Interviewees from food companies acknowledged | N/A | Consumers regard information sharing and communication as something that is done for them by the food industry through for example labelling and campaigns. And they do not consider an active role for |

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| **impact on trust** | manufacturers, participants argued that retailers were trying to maximise their profit and for this purpose, they took advantage of consumers' lack of knowledge. | At the same time, industry experts highlighted that consumers with more knowledge about the food industry could perhaps understand the sector and its complexities better and, as a result of this, levels of trust could be higher. | that they are **not clear** about what trust means to consumers. Further, communication and campaigns that raise consumer awareness are at the centre of government and semi-government authorities' agendas. Further, the government authorities mentioned that they share information about the trustworthiness of the rest of the supply chain. | | themselves in seeking further information and taking the initiative to communicate with the supply chain. However, industry experts believe that any meaningful change will only be possible through shared responsibility and co-creation. Further, from the industry perspective, changing attitude and raising awareness per se are not enough if they do not go hand in hand with behaviour change. |
| **Perceptions of marketing practices and how it impacts consumer trust** | Participants argued that retailers try to **mislead consumers** by their marketing activities, and they offer the same products with different brand names with different prices. | Marketing and advertising practices were not directly discussed by workshop participants. However, participants talked about the importance of the existence of **shared values** between the food industry and its stakeholders/consumers. | Government authorities identified marketing practices, which are **deliberately misleading**, as a major issue when it comes to consumer trust. Interviewees suggested marketing practices should be in line with the industry values. They also mentioned that sometimes food companies are looking for consumer trust for the wrong reason, namely profit-making and sales. | In line with focus groups, Delphi survey results demonstrate that honesty in advertising and marketing practices is the **third most important** action in relation to building trust with retailers. | Consumers and government authorities perceive food industry's marketing and advertising practices as deceptive with the wrong purpose (e.g. profit making, higher sales). They voice the need for higher honesty in advertising activities and this is reflected in industry experts' view of industry-stakeholder shared values. |
| **Perceptions of crisis/scandal management and how it impacts trust** | Focus group participants mentioned that their trust in the food system is **fragile and likely to be broken** with one scandal (e.g. the horsemeat scandal) and once broken, it would be really hard for the food system as a whole or for a supplier to regain their trust. | Workshop participants highlighted that most issues have short-term impact as people usually have a short-term memory and they tend to be **forgetful**. However, certain scandals and issues tend to have a longer-term impact and stay in consumers' memory for a long time. Participants highlighted the | Workshop participants argued that large-scale scandals, like the horsemeat scandal cause some harm on consumer trust, but at the same time, alerts from government bodies **do not receive much media attention**, therefore, many food safety cases are just not known to the consumer. | N/A | Both consumers and industry experts agree that large-scale scandals can damage consumer trust. While some industry experts suggest that most issues have short-term impact on consumer trust, others suggest that certain safety issues and problems do not get enough attention as there is not enough media coverage around them. |

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| | | importance of identifying which issues are going to be in the second category and need to be addressed in a more serious manner. Large-scale scandals/crisis undoubtedly decrease levels of trust. If crisis are managed in a serious (and perhaps genuine) manner, levels of trust could increase. However, the opposite could happen if crisis are not managed appropriately. | | | |
| Perceptions of sustainability and how it impacts trust | Participants of the focus groups associated sustainability practices with trust. In this regard, focus group participants talked about **animal welfare, waste reduction, and plastic bags** and argued that the food supply chain should prioritise addressing these sustainability matters. | In industry workshops, sustainability practices were identified as important in markets where the baseline of quality, health and safety has already been met (e.g. in **developed countries/European countries**). Further, participants argued that in theory, consumers are supportive of innovative sustainability initiatives. However, in certain occasions, they were not ready and willing to pay the price for this. | The **environmental impact of food production and animal welfare** were also highlighted by interviewees in England as well as Northern Ireland. Interviewees argued that environmental impact and animal welfare affect consumer trust as consumer awareness rises and consumers become more educated. With regard to sustainability, industry experts argue that consumers are starting to place more importance on where and how food is grown, be it for health or ethical reasons. | In the Delphi survey, reducing waste has been highlighted as **the most important action** of retailers in relation to consumer trust. For farmers, assuring high animal welfare standards is identified as the most important action in relation to consumer trust. | Sustainability practices were identified as important by both consumers and industry experts. Consumers are interested in a more sustainable supply chain. However, industry experts highlighted that firstly, sustainability is not the priority in all markets and secondly, when consumers are supportive of sustainability initiatives, in reality they are not willing to pay the price for it. |

Some Key Insights from the GAP Analysis:

There is a consensus across all groups on the following topics:

- Initiatives that improve transparency can increase consumer trust.
- Increasing access of consumers to farmers can improve trust.
- Sustainability initiatives can build trust.

There is divergence on the following topics:

- Marketing: Are food supply chain companies well intentioned in marketing? How can they signal positive intentions?
- Communication: Should it be two-way or one-way? Are consumers really interested in communicating with food chain actors? Will food chain actors really listen to consumers?
- Costs associated with building trust: Will consumers pay a premium for greater transparency and sustainability?

# Implications for future EIT projects and implications for industry

| Categories | GAP ANALYSIS (Summary of key points) | Implications for future research (e.g. EIT funded work within this grand challenge in years to come) | Implications for industry actions to improve consumer trust (e.g. which type of activities may be beneficial, what type of communication campaign) |
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| Perceived trust in supply chain actors (farmers, manufacturers, retailers, governmental bodies) | Consumers' trust in the supply chain actors is likely to be based on blind faith and their need to trust, rather than on an informed trust shaped by information and education. Further, there is a gap between what trust means to consumers and what consumer trust is for practitioners and industry experts.<br><br>Both consumers and experts from governmental bodies view regulatory and governmental bodies as enablers of trust for the rest of the supply chain. However, the view of the industry diverges from that of consumers in regard to consumers' trust in large organisations and retailers. | Understanding the implications of informed consumer trust on their perception of and relationship with the food supply chain.<br><br>Providing a better understanding of what trust means to consumers and what consumer trust is to the food supply chain and then bridging this gap through communication campaigns to reach a mutual understanding and a mutual definition. | Guiding consumers from blind faith to informed trust through communication campaigns ran by government authorities as well as food companies.<br><br>Clarifying and communicating the role of government authorities in the supply chain. Using their platform and voice for communicating credible messages to consumers.<br><br>Working on increasing consumer trust in food manufacturers and retailers through transparency programmes (discussed in the next section).<br><br>Further collaboration of food manufacturers and retailers with government authorities to improve consumers' perception of these actors.<br><br>Further collaboration with key media people to communicate what food actors are doing right and getting right (positive media coverage).<br><br>Reaching a deep understanding of societal norms and trends and deciding which trend and which social movements are in alignment with organisational and stakeholders' values and thus the organisation can join them. |
| Perceptions of food safety, food quality (and its ingredients) and its impact on | Food safety and quality are still strongly associated with trust by consumers and governmental bodies. Further, consumers and governmental bodies still have their doubts about safety and quality. However, to some extent, the industry's | Understanding consumers' safety and quality concerns and investigating the role of culture and cultural norms in this, even in countries that have already met the baseline of quality and safety. | Providing consumers with a platform through which they can voice their concerns.<br><br>Making the safety alerts of government agencies more visible to consumers. |

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| consumer trust | assumption is that quality and safety are boxes, which are already checked by supply chain actors and there is no need to take any further actions in this regard in certain Western countries. | | |
| Perceptions of transparency and its link to consumer trust | The need for higher transparency of food manufacturers and processors have been highlighted in focus groups, workshops, industry interviews as well as the Delphi survey.<br><br>From the industry perspective, there is the fear that transparency backfires, however consumers highlight that transparency is of importance even if actors have erred in the past. Transparency is implicitly present in the Delphi survey findings in regard to honest actions of retailers and caterers. | Determining the potential consequences of radical transparency programmes.<br><br>Determining what food industry and its actors can learn from other industries and previous case studies (e.g. organisations' transparency programmes).<br><br>Identifying what the risks are and where the risks are with transparency programmes, who is affected by them, and then finding solutions to mitigate those risks.<br><br>Measuring the impact of transparency on consumer trust (especially for food manufacturers and retailers). | Breaking down transparency programmes into smaller, more manageable blocks/initiatives (e.g. production line transparency, marketing practices transparency).<br><br>Sharing responsibility and co-creating change with stakeholders/consumers through stakeholder engagement.<br><br>Building purpose driven brands, which are evidence-based, fact-based, and honest about the product.<br><br>Finding solutions to assure inter-organisation and intra-organisation consistency in an inter-connected, global supply chain. |
| Perceptions of locality and its link to consumer trust | Industry experts are more hesitant about the consequences of going completely local on prices, availability of products as well as brand identity. They believe that there should be a balance between going local and keeping the global standard and when needed, organisations can give back to local communities by employing people from a certain local community, for example. However, as a result of the COVID-19 pandemic, consumers who participated in focus groups and the Delphi survey feel the need for local supply chains more than ever and feel an urgency in supporting local producers and farmers. | Investigating the consequences of reshoring and shortening of the supply chain on consumer trust.<br><br>Investigating the long-term impact of COVID-19 on their preference for local producers and local products through longitudinal studies. | Creating partnerships with local communities and making a difference in the quality of life of local communities.<br><br>Starting initiatives that allow local communities to understand the purpose and values of a business.<br><br>Listening to local communities to understand how the business can be of benefit and use for local people (co-creation).<br><br>Determining how the business can support the local producers of the supply chain. |
| Perceptions of traceability and its link to consumer trust | Both industry experts and consumers agreed on the importance of the ability of tracing food and its ingredients to their source and origin and both agreed that there is more that can be done in this regard. Consumers go as far as requesting farm-specific on top of country-specific traceability. | Understanding the barriers in the face of traceability, and how to overcome them. | Determining the potential use of blockchain technology in traceability initiatives.<br><br>Working with start-ups that have food supply chain traceability in their agenda. |

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| Perceptions of communication and information sharing (education, raising awareness, labelling) and its impact on trust | Consumers regard information sharing and communication as something that is done for them by the food industry through for example labelling and campaigns. And they do not consider an active role for themselves in seeking further information and taking the initiative to communicate with the supply chain. However, industry experts believe that any meaningful change will only be possible through shared responsibility and co-creation. Further, from the industry perspective, changing attitude and raising awareness per se are not enough if they do not go hand in hand with behaviour change. | Investigating how the science of behaviour change can be of use in bridging the attitude-behaviour gap for consumers.<br><br>Conducting further research to understand which type of communication and which campaigns are more effective in bringing about meaningful change.<br><br>Investigating the roles that consumers can play in delivering more effective consumer education/campaigns aimed at increasing consumer trust. | Determining how to get consumers involved and how to best communicate to them their role in the co-creation process.<br><br>Determining how to best use the science of behaviour change and how to design campaigns that draw upon the science of behaviour change.<br><br>Understanding how to best make use of the change in consumer habits due to COVID-19 in the long-term. |
| Perceptions of marketing practices and how it impacts consumer trust | Consumers and government authorities perceive food industry's marketing and advertising practices as deceptive with the wrong purpose (e.g. profit making, higher sales). They voice the need for higher honesty in advertising activities and this is reflected in industry experts' view of industry-stakeholder shared values. | Investigating what consumers want to see in food companies advertising and marketing activities.<br><br>Investigating the balance between driving sales, raising awareness, and honesty in marketing and advertising activities of food organisations. | Including marketing and advertising activities in their transparency programmes.<br><br>Learning from the food industry's or other industries' best marketing/advertising practices. |
| Perceptions of crisis/scandal management and how it impacts trust | Both consumers and industry experts agree that large-scale scandals can damage consumer trust. While some industry experts suggest that most issues have short-term impact on consumer trust, others suggest that certain safety issues and problems do not get enough attention as there is not enough media coverage around them. | Investigating which types of issues impact consumer trust for a shorter period of time and which types of issues are considered as major incidents for consumers; and whether there are any cultural differences in redlines (which are not to be crossed) for consumers in different markets.<br><br>Investigating how to best communicate with consumers about a crisis so that the reputation of the organisation is not jeopardised.<br><br>Investigating how organisations can recover from large-scale major scandals and rebuild trust with consumers. | Being proactive and honest, being at the top of these scandals and informing consumers accordingly. New insights would be valuable, as they would provide a clearer direction for action. |
| Perceptions of sustainability and how it impacts trust | Sustainability practices were identified as important by both consumers and industry experts. Consumers are interested in a more sustainable supply chain. However, industry experts highlighted that first, sustainability is not the priority in all markets and second, when consumers are supportive of sustainability initiatives, in reality they are not willing to pay the price for it. | Understanding the cultural differences in perception and priority of sustainability in various markets.<br><br>Investigating how to best raise awareness of the priority of sustainability in markets where the baseline of quality, health, and safety is not met yet. | Developing a rating system for ethicality of manufacturers and food producers (similar to the hygiene ratings for restaurants).<br><br>Encouraging organisations to give high priority to sustainability, even in markets where it is not yet a priority. |

# How can the insights of the report inform the planned crowd ideation

- **Which gaps could possibly be filled through a communication campaign?**

Perceptions of communication and information sharing (education, raising awareness, labelling), its impact on trust, as well as perceptions of transparency and its link to consumer trust can be addressed through a communication campaign.

- **Which 1 or 2 potential industry actions (including communication campaigns) may benefit significantly from crowd ideation?**

*For actions related to communication and information sharing:*

1. Determining how to get consumers involved and how to best communicate their role in the co-creation process.
2. Determining how to best use the science of behaviour change and how to design campaigns that draw upon the science of behaviour change.

*For actions related to traceability:*

2. Determining the potential use of blockchain technology in traceability initiatives and/or working with start-ups that have food supply chain traceability in their agenda/business plan.

*For actions related to sustainability:*

3. Developing a rating system for ethicality of manufacturers and food producers (similar to the hygiene ratings for restaurants).