



THE CANADIAN CENTRE FOR  
**FOOD INTEGRITY**

2017 PUBLIC TRUST RESEARCH



TACKLING TRANSPARENCY  
AND HOW IT BUILDS TRUST





THE CANADIAN CENTRE FOR  
FOOD INTEGRITY



**Helping Canada's food  
system earn public trust**



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# THE 2017 RESEARCH

## THE 2017 RESEARCH

The 2017 CCFI Public Trust Research builds on the benchmark data collected in 2016; with trend data from previous waves of our predecessors' Farm Issues Studies dating back to 2006; and the extensive Consumer Trust research undertaken by The Center for Food Integrity in the United States since 2007.

The CCFI Research Advisory Panel helped to establish priorities, key areas of study and reviewed study design. This group has extensive experience in consumer research, with great insights on what data would be most valuable for Canada's food system. [See page 21 for an overview of the team members.]

This year **transparency and how it works to earn trust** was chosen as the focus. Similar work on transparency was conducted by the U.S. CFI in 2015, which allows for valuable North American comparisons.

The 2017 web-based survey was completed in May and June by 1,307 respondents in both French and English who reflect the general Canadian consumer population over the age of 18.

To provide deeper insights, we segmented the respondents into three groups: moms, millennials and foodies. We made some extra effort with millennials and divided the segment into early and late millennials, to help answer some questions raised in the 2016 research.

The study was also segmented by the Everett Rogers Diffusion of Innovation theory which seeks to explain how, why and at what rate new ideas and technology spread through cultures from innovators to laggards.

We focus on early adopters as the group with the highest degree of opinion leadership, as others look to them for information when making decisions. The segmentation of this research will help us better understand what's most important, relevant and likely to build trust with these key target audiences.

The information in this report is a summary of the 2017 research which is meant to be broadly shared. CCFI members have access to the full comprehensive results and customized insights. Contact CCFI directly to book a presentation or find out more. CCFI welcomes your input and ideas for future areas of study, as this work is meant to help Canada's food system earn trust.

### Research objectives:

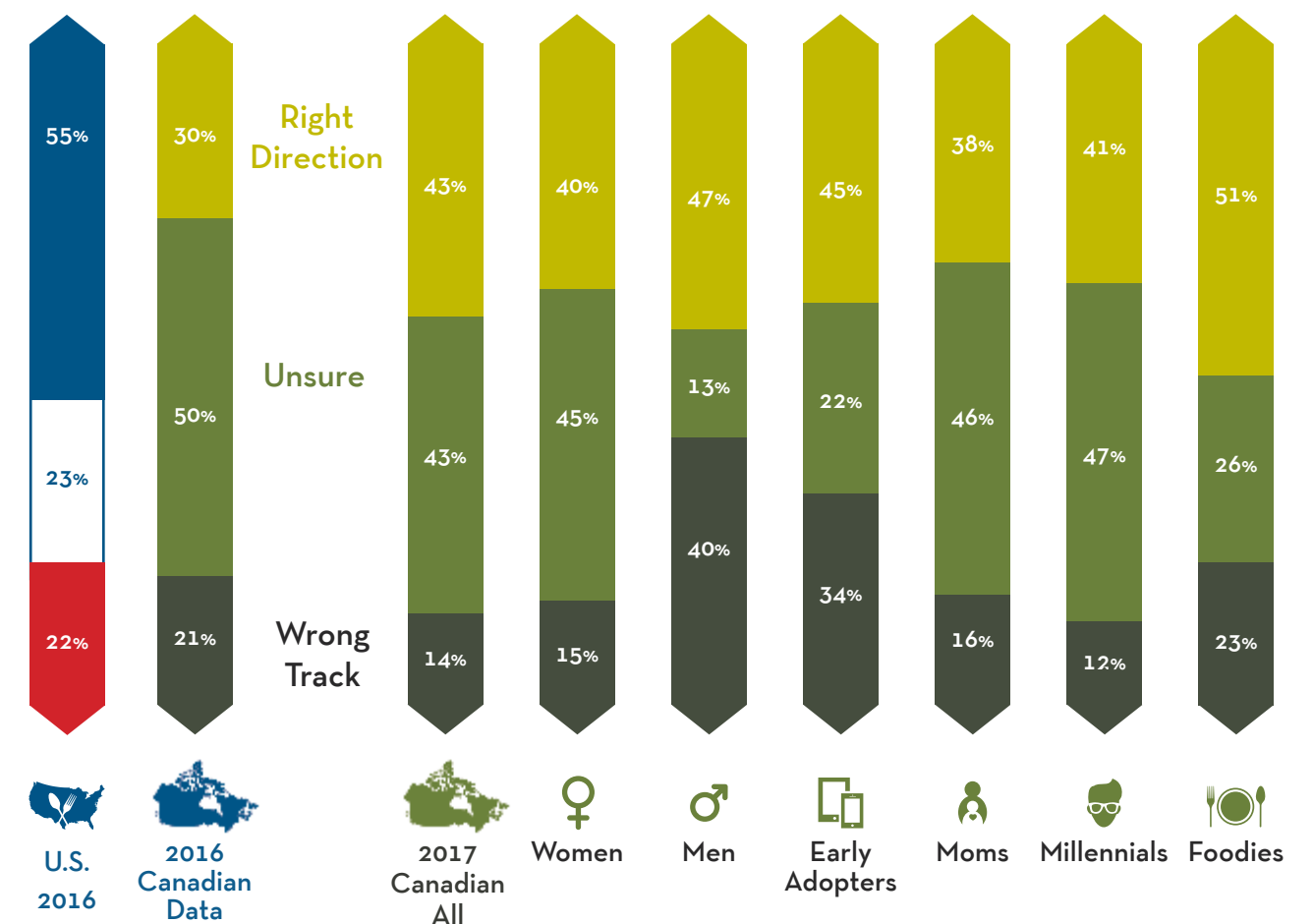
- To gauge and track public attitudes about Canadian food, agriculture and the food system
- To study key influencer segments of foodies, moms, millennials, and early adopters
- To understand consumer expectations for transparency for various food system stakeholders, and drivers of transparency for food companies specifically



# IS THE FOOD SYSTEM HEADED IN THE RIGHT DIRECTION?

**Survey results show** a significant increase in the number of consumers who feel the food system is heading in the right direction – 43 percent in 2017 compared to just 30 percent in 2016. This increase was consistent across all segments – male, female, early adopters, moms, millennials, and foodies.

Note the differences between segments and the U. S. consumer data from 2016.



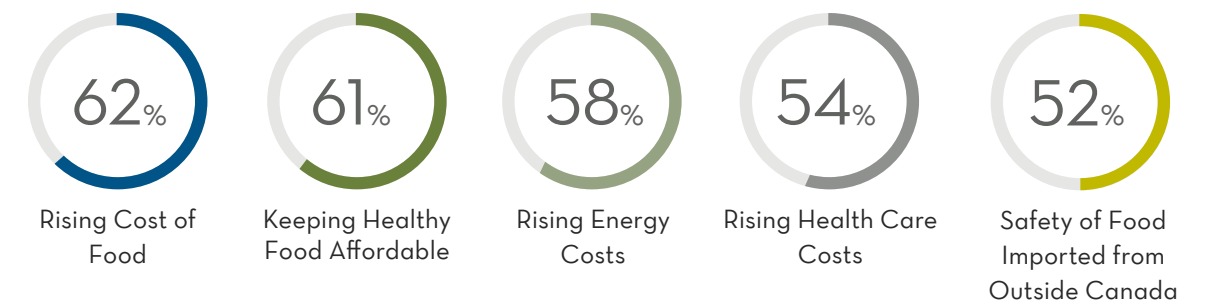
\* Percentages may total more than 100% as the graphics contain whole percentages that are rounded.



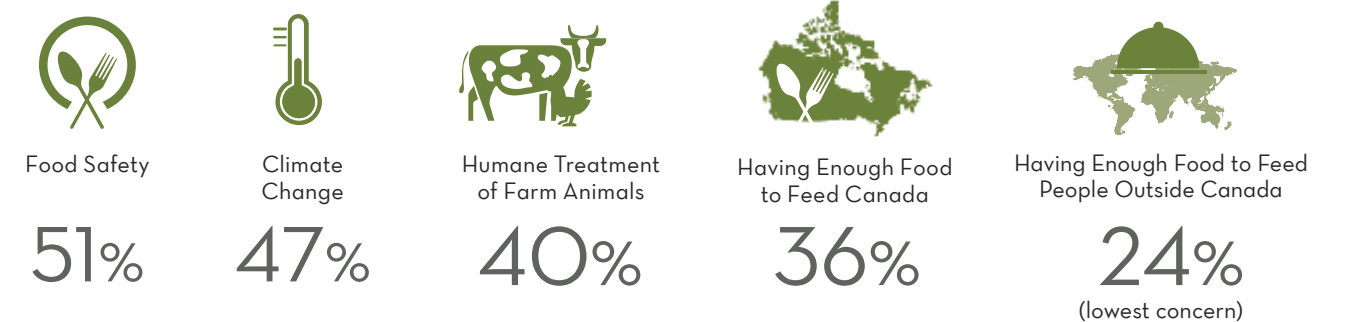
# LIFE ISSUES IN PERSPECTIVE

## PUTTING LIFE ISSUES IN PERSPECTIVE

Survey participants were asked to rate their level of concern on several life issues including broad areas like health care costs, unemployment, food safety and food affordability. This is important at the beginning of the study to provide larger context for food system issues. **The rising cost of food and keeping healthy food affordable** maintained the top two positions again in 2017. The safety of food imported from outside Canada made the top five, as the concern for the Canadian economy dropped out of the top five in 2017.



## MORE FOOD SYSTEM CONCERNS

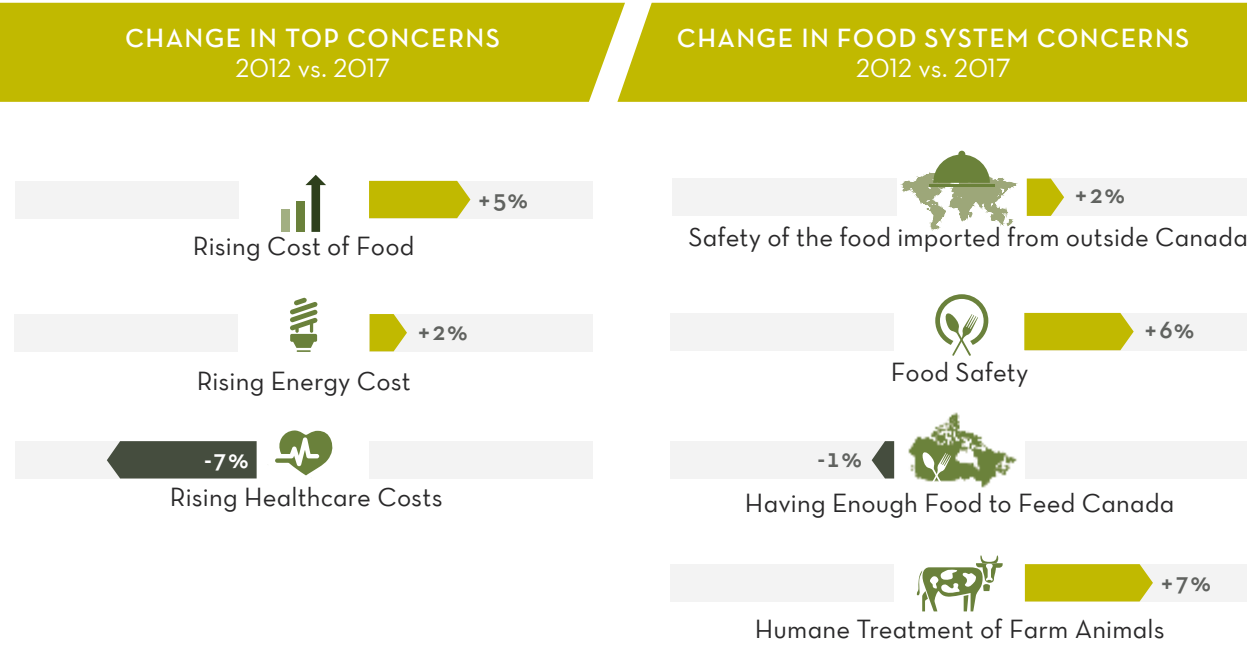


Consumers are generally less concerned about most of the life issues in 2017 compared to 2016.

- Women were more concerned about all issues than men.
- Early adopters were more concerned about all the issues than later adopters.

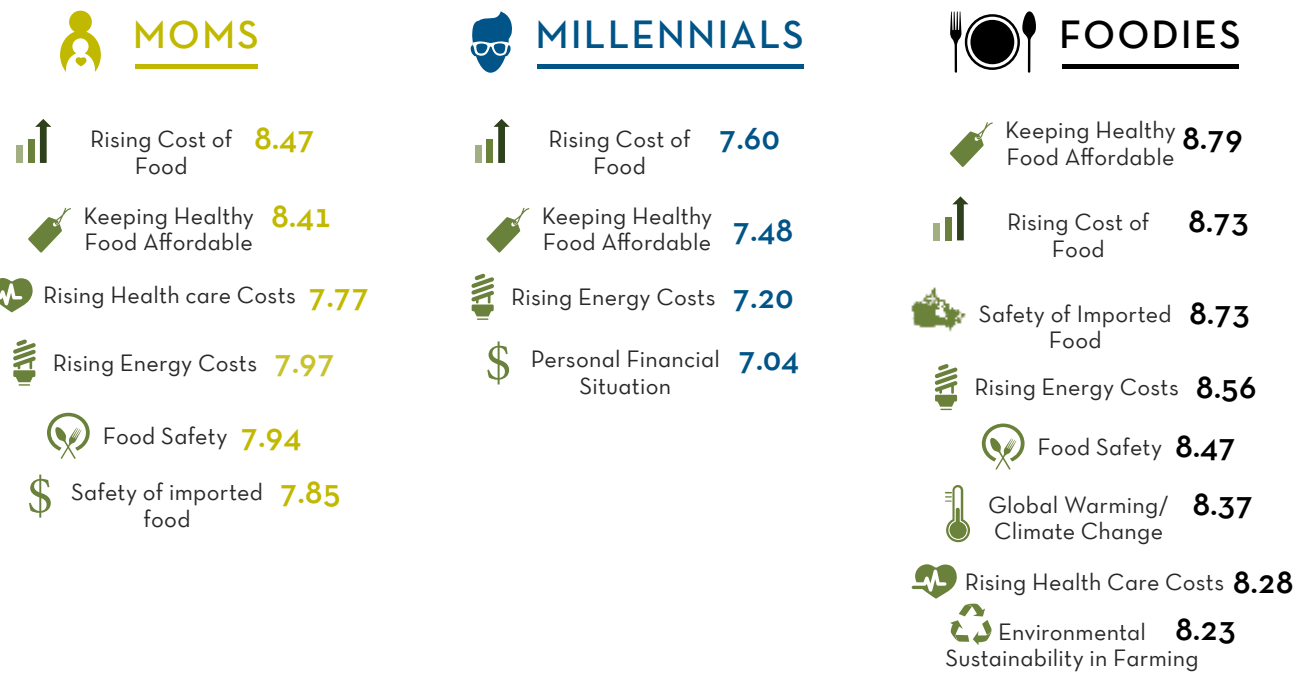
The numbers reflect the percentage of those who selected an 8-10 on a 0-10 scale.

# CANADIANS ARE GENERALLY MORE CONCERNED ABOUT TOP ISSUES IN 2017 COMPARED TO 2012



In contrast, most concerns are down from 2016, most notably humane treatment of animals. The changes in top concerns show percentage point changes. For example, rising cost of food was rated at 57% concern in 2012 and 62% in 2017.

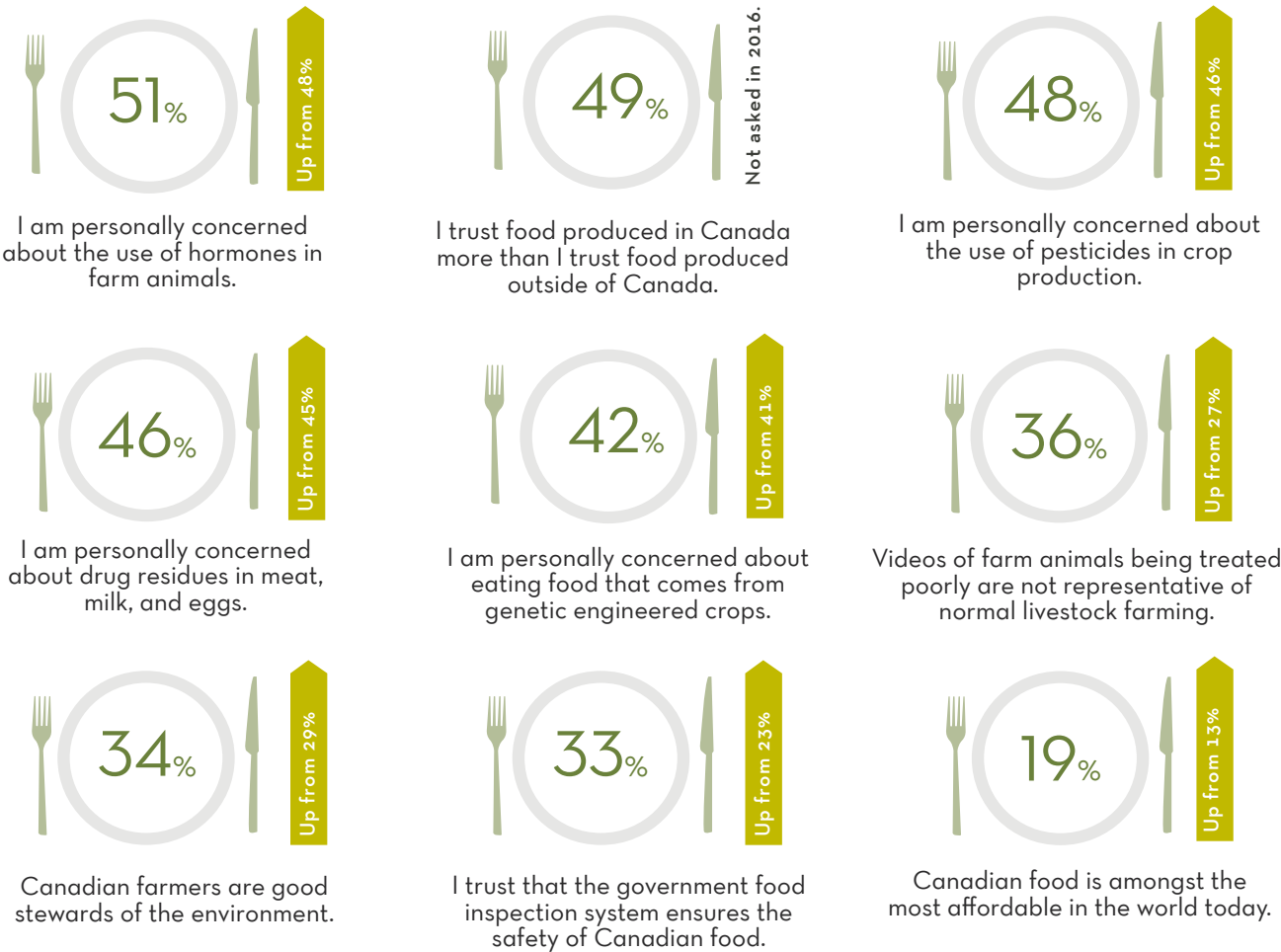
## TOP CONCERNS ABOUT ISSUES BY SEGMENT\*



\*Foodies expressed a higher level of concern on all issues, followed by moms.  
\*The segment numbers reflect the average level of concern for each segment about each issue on a scale of 0 to 10.

# PUBLIC ATTITUDE TRACKING

## 2017 AND CHANGES FROM 2016



CCFI's research tracks consumers attitudes on food system issues over time. This tracking enables the food system to determine trends and hot topics. It's also valuable perspective on how issues compare to others.

The numbers reflect the percentage of those who selected an 8-10 rating in 2017. The arrows show the 2016 results.



# TRANSPARENCY

## WHAT DO WE NEED TO KNOW ABOUT TRUST-BUILDING TRANSPARENCY?

Companies and organizations must share information – both positive and negative – that is accurate, easily understood and relevant to consumers. Perhaps less obvious to some is the importance of open dialogue and engaging consumers, which will only continue to increase as personalized digital communication dominates the way consumers connect.

Consumers want to know if companies are listening, acknowledging their questions and feedback, and explaining how and why they make decisions. A commitment to engaging quickly and consistently is necessary to show that your motivations are aligned with consumers and that you are being transparent.

Transparency is defined in this study as, “providing the type and amount of information, using language and terms that are easily understood, that helps you make informed decisions.”

## SEVEN ELEMENTS OF TRUST-BUILDING TRANSPARENCY



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# MODEL CLEARLY DEFINES TRUST BUILDING TRANSPARENCY

Our CCFI research measured 35 different attributes across seven elements that contribute to trust-building transparency. The findings were consistent across the elements:



One-quarter to one-third gave top box ratings (8-10) on most statements across elements of transparency.



Foodies rated all transparency attributes higher than moms and millennials in contributing to trust.



Early adopters rated all transparency attributes higher than later adopters in contributing to trust.

The modeling shows that there is a strong relationship between transparency and trust.



## Key transparency elements provide a roadmap to building trust

- **Accuracy** (accurate, reliable and complete information)
- **Clarity** (easy for consumers to understand)
- **Motivations** (ethical principles guide behaviour, not intentionally mislead, interested in consumer well-being, takes public interest into consideration, improves the community)
- **Disclosure** (useful, timely and easy to find information, does not withhold damaging information, easy to understand)

Which of the global elements of transparency is most related to trust?

**Accuracy** shows the significantly highest overall mean score indicating it is most strongly related to trust.

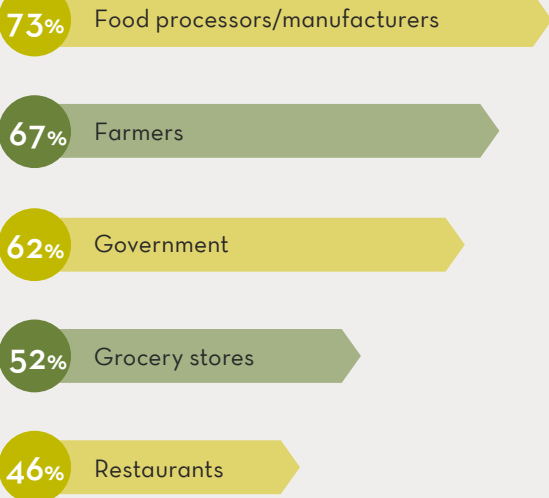
## TRANSPARENCY - WHOSE JOB IS IT?

All stakeholders in the food system play a role in providing information to their customers, as transparency demands transcend every ingredient in the supply chain.

We asked consumers. They responded that food processors and manufacturers are most responsible for providing information about how their food is grown or produced so they can make informed decisions.

This result is similar to the findings in the US CFI research from 2015. One difference to note - CCFI research added government to the mix of options for Canadians to choose from across several questions, including this one.

These numbers are the percentage of those who rated that answer with an 8-10 on a 10 point scale.





# KEY CATEGORIES AND PRACTICES THAT MATTER FOR FOOD COMPANIES

To better understand the practices consumers associate with demonstrating trust-building transparency in food companies specifically, survey participants were asked to rate a list of practices in five key food system areas:

- Food safety
- Environmental impact
- Animal well-being
- Labour and human rights
- Business ethics

Respondents were asked to rate the degree to which food company policies, practices, track record (performance) and third party audits demonstrates transparency for each of the five areas above.

- About 4 in 10 believe that providing information actually demonstrates transparency in all key areas.
- Nearly half believe that being transparent in each area builds trust.

- Foodies believe all types of information demonstrate transparency compared to moms and millennials across all five food system topics tested. Moms believe audits and track records demonstrate transparency compared to millennials – definitely a “prove it” segment.

Some transparency activities are more important to consumers than others. For example, for food safety, CCFI’s research shows that identifying all ingredients in the food on the nutrition label, regardless of quantity, is a much stronger activity demonstrating transparency than providing safe handling instructions on the package. A detailed analysis of these specific activities is available to CCFI members.

This study shows that consumers expect companies to be transparent about all five topics tested. Consumer trust in your products, your people, and your brands depends on it.

# WHO IS RESPONSIBLE FOR TRANSPARENCY?

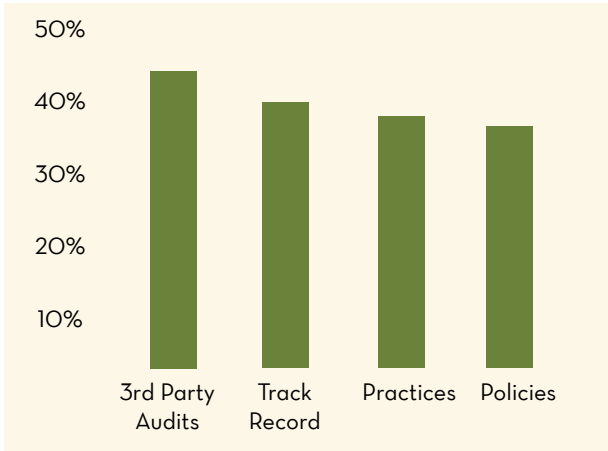
We asked consumers who they hold most responsible for demonstrating trust-building transparency. This study shows consumers look to food manufacturers to provide transparency on food safety, followed by farmers and the government. Farmers are held the most responsible for demonstrating trust-building transparency when it comes to environmental impact and animal well-being.

	Food Processors/ Food Mfgs.	Government	Farmers	Grocery Stores	Restaurants
Food Safety	1	2 (tie)	2 (tie)	3	4
Impact of Food Production on the Environment	2 (tie)	2 (tie)	1	3	4
Labour and Human Rights in Food Production	1 (tie)	1 (tie)	2	3	4
Treatment of Animals Raised for Food	2	3	1	4	5
Business Ethics in Food Production	1	2	3	4	5

Respondents allocated 100 points across the groups responsible for providing information in each transparency topic. The numbers shown above are the average number of points allocated to each group, across all respondents.



## HOW TO DEMONSTATE TRANSPARENCY



(n=1307)

About four in ten Canadians gave an 8-10 strong agreement that providing the above information on the food company website demonstrates transparency across all five food system topics. This is similar but slightly lower than U.S. findings from 2015.



## US CONSUMERS PRIMARILY HOLD FOOD COMPANIES RESPONSIBLE FOR TRANSPARENCY IN 2015

	Food Processors/ Food Mfgs.	Farmers	Grocery Stores	Restaurants
Food Safety	1	2	3 (tie)	3 (tie)
Impact of Food Production on the Environment	1 (tie)	1 (tie)	3	4
Labour and Human Rights in Food Production	1	2	3	4
Treatment of Animals Raised for Food	1	2	3	4
Business Ethics in Food Production	1	2	3	4

Note: this is not a direct comparison as the U.S. consumer did not have government as an option choice.

# MILLENNIAL INSIGHTS

**Millennials** (also known as generation Y) are the demographic cohort following generation X. This generation is known for an increased use of communications, media, and digital technologies, and a liberal approach to politics and economics. For this study, we used 18-25 year olds as early millennial and 26-34 year olds as late millennial.

In the 2016 CCFI research, millennials proved to be quite different than other segments on several food system issues and concerns that raised more questions. Understanding these young consumers and future decision makers is an important undertaking for the food system. This year's research split the millennial segment into two and asked a few supplementary questions to help understand their "why."

- Millennials express lower concern about all of the life issues and current events than moms and foodies.
- Late millennials expressed a higher concern for food safety, compared to early millennials.

## Foodie Behaviour

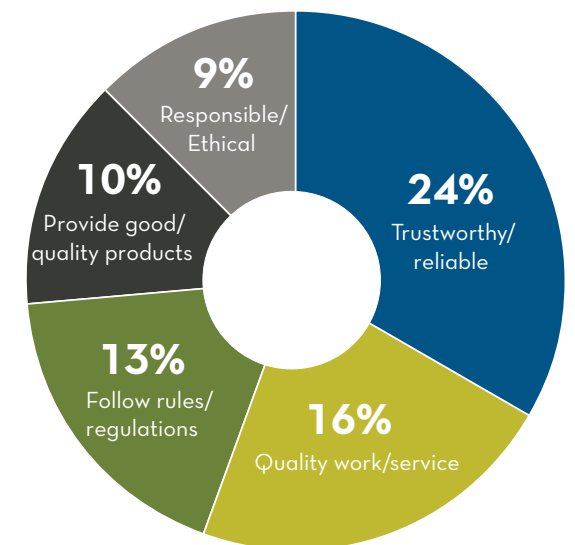
Millennials are less likely to participate in foodie behaviours, such as seeking out information about food issues or sharing information with other about food issues, compared to moms and foodies

- Late millennials are more likely to share information about cooking and recipes, compared to early millennials.

## Trust in Farmers

Millennials report lower trust scores for farmers, the way Canadian farmers grow food and information that comes from Canadian farmers, compared to moms and foodies.

Among millennials who rate their trust high (8-10 on the 0 to 10 scale), primary reasons include:



## Right track?

Just under half of millennials (43%) believe the food system is moving in the right direction. This is slightly less favorable than foodies (51%), but more favorable than moms (38%). Only 13% believe the food system is on the wrong track.

We asked them why they felt that way.

### Primary reasons for "Right Track":

- Regulated (21%)
- Improved/positive changes (19%)
- More public awareness/information available (13%)

### Primary reasons for "Wrong track":

- Prices increasing (17%)
- Chemicals/pesticides (15%)
- Lack of inspection/regulation (10%)

### Primary reason for "Unsure":

- Need more information (57%)



# WHAT WE LEARNED AND HOW TO APPLY IT

This research is uniquely designed to be actionable by anyone in the food system – from individual farmers to food retailers and everyone in between.

The trend watching is meant to help shift thinking, resources and actions proactively. What’s really important to consumers versus what may be inflamed in the news, social media or by critics with a specific cause? How are Canadians different or the same as Americans?

Understanding different segments can help you prioritize your outreach plans and investment most effectively with more significant results.

And this year’s deeper dive on transparency is meant to help address the question, “if transparency is no longer optional, what does that mean?”

## What’s important to Canadians?

The rising cost of food and keeping healthy food affordable ranked as the top two concerns for the second year in a row over a long list of others including health care, energy and the economy. This is a really important factor when thinking about ways to most successfully engage with anyone, particularly those who don’t work in food or agriculture. This creates an opportunity to discuss how what you do helps to keep healthy food affordable.

## Reach the uncertain

Concerns on many food system issues such as antibiotics, pesticides and GMOs remained constant in 2017. While this helps validate the findings from the earlier research, it also shows that existing efforts to move the bar on these topics haven’t reached the majority in the ‘neutral zone’ yet. What can you do to engage on some new channels or with some new thinking to reach those who aren’t sure what to think?



Foodies love to share information, more than any other segment – about food, about nutrition, about cooking, about food safety. They also actively seek out information, on all things food including specifics like how food processing affects food safety and how food is grown.

Others go to them for information about food. The research shows foodies are more concerned about most food system issues than other segments, yet also often more positive. This is a unique opportunity for those working in the food system. Foodies are engaged information seekers and sharers looking for authentic answers to everything ‘food’ in Canada.

## Engage with millennials

The 2016 CCFI research showed millennials had less trust in traditional sources and were less concerned with all food related issues than other segments. This year’s deeper dive into this segment shows some opportunities with those reporting neutral to negative views. There is a desire for more information and to engage. Food system stakeholders should think about messengers, messages and channels to engage with millennials in meaningful and authentic ways, perhaps like never before. Think in pictures and video and about what they value most first.



# UNDERSTANDING THE AUDIENCE FOR TRUST-BUILDING TRANSPARENCY

## There is no single consumer group.

The internet has fostered the formation of online communities where people, whose values and interests align, can gather and share information. Marketer and digital expert Seth Godin calls them “tribes”. According to Godin, a group needs only two things to be a tribe: a shared interest and a way to communicate.

Today’s consumers are diverse, yet engage and communicate similar viewpoints on food by forming tribes. Each consumer is unique and every consumer will display characteristics of other tribes, but ultimately everyone has a primary tribe to which they return. People may also switch tribes as events and circumstances affect their lives. Think about this when planning who and how to engage with to be most effective in earning trust.

# WHAT DEMONSTRATES TRANSPARENCY?

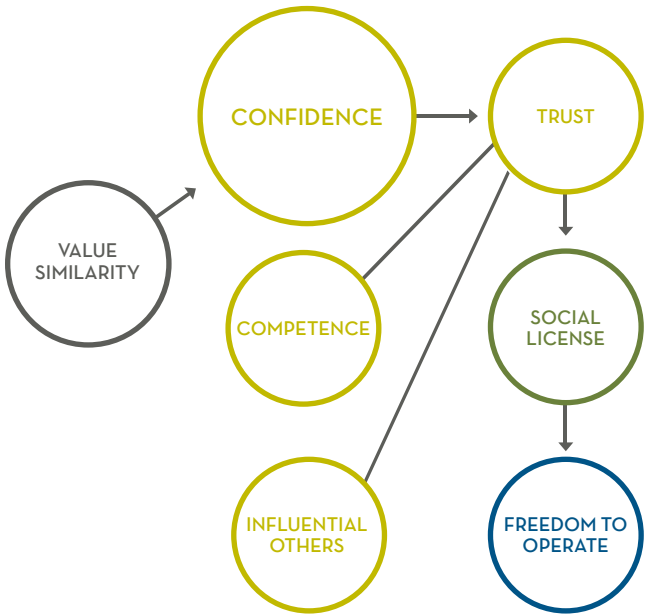
Story telling and providing consumers with examples of business practices are important. Talking about what you do is key to being transparent. When it comes to transparency that actually increases trust, policies was most predictive of trust in four of the five topic areas, with a range of expectations depending on the subject. To summarize, Canadians look for information on all four categories: policies, practices, performance and verification.

Policy is the way an organization articulates motivation and reflects its values. Practice is the way an organization demonstrates its commitment. Third party audits are an external function validating performance. Consumers are saying “show me your practices and explain to me how you’re verifying them.”

Having policies that reflect consumer values and practices that demonstrate them will most likely lead to overcoming negative bias and building trust.

As scientifically proven in CFI’s consumer trust model, demonstrating shared values is the foundation for building trust.

Consumer Trust Model



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Of the three primary drivers of trust – confidence (shared values and ethics), competence (skills and ability), and influential others (family, friends, and credentialed individuals) – confidence is most important in building trust.





## 2017 CANADIAN PUBLIC TRUST RESEARCH ADVISORY PANEL

Our thanks to this team for their insights and leadership in developing and implementing the 2017 Canadian Public Trust Research. This work will continue to evolve to take a closer look at different segments, topics, and actionable concepts.

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Funding for this research comes from the shared investment of all of the members of the Canadian Centre for Food Integrity. Our members represent the diversity of the food system with a commitment to a better understanding of Canadian consumers related to trust and issues in food and agriculture.

This research is intended to be widely communicated for the benefit of the entire food system to help better understand the Canadian public’s views and expectations of our food. Permission is granted to share any of this work with credit to the “Canadian Centre for Food Integrity 2017 Public Trust Research.”

With thanks to the following for their investment in additional provincial data collection and reporting:

Prince Edward Island Department of Agriculture and Fisheries

## OUR APPRECIATION

As global food trends play out in the developed world, in North American markets, and here at home in Canada, the need for and advantages of a collected coordinated approach to earning public trust in food systems continues to evolve. The work of the Canadian Centre for Food Integrity is elevated with the foundation of investment, research, and expertise already established by The Center for Food Integrity (CFI) in the United States. Canada’s food system leaders would like to express our sincere appreciation to the members, board, and staff team of CFI for the continued partnership.





THE CANADIAN CENTRE FOR  
**FOOD INTEGRITY**

HELPING CANADA'S FOOD SYSTEM EARN TRUST

Additional insight, segmentation, and detail is available. Please contact us for more information on the research, membership with the Canadian Centre for Food Integrity, or to schedule a presentation.

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