

2019 PUBLIC TRUST RESEARCH

Connecting with Canadians



THE CANADIAN CENTRE FOR
FOOD INTEGRITY



THE CANADIAN CENTRE FOR
FOOD INTEGRITY

The Canadian Centre for Food Integrity (CCFI) is a national charity with a clearly defined mandate as the service provider to help Canada's food system earn trust by coordinating research, resources, dialogue and training.

As CCFI gains traction in Canada, the opportunities for collaboration among industry partners, stakeholders, members and consumers continues to grow. Leading the way in spreading the message of the importance of public trust is key for Canada's food system.

MISSION

Helping Canada's food system earn public trust by coordinating research, resources, dialogue and training.

VISION

To be Canada's recognized service provider in food system trust collaboration.

VALUES

Integrity
Empowerment
Excellence
Accountability
Transparency
Collaboration

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THE 2019 RESEARCH

THE 2019 RESEARCH

The 2019 CCFI Public Trust Research is an innovative compilation of consumer research studies that independently provide key information for Canada's food system but together deliver an integrated strategy to connect with consumers through effective communication efforts.

The 2019 research offers benchmark data to understand the overall sentiment of how Canadians view Canada's food system and allows the food system to evaluate the next steps in building public trust.

The following three topics were the focus of the 2019 Research:

1. Public Trust Tracking: Key Issues within Canada's Food System

The 2019 web-based survey collected results from a sample of 2,189 Canadians from June 5th, 2019 to June 25th, 2019. The sample is representative of the general Canadian consumer population aged 18 years or older.

GOALS

- To gauge and track public attitudes about Canadian food, agriculture, and food system issues, with comparison to U.S. CFI data
- Understand who Canadians trust and hold responsible and where Canadian consumers are turning to for information when it comes to food related topics

2. Digital Ethnography: A Deeper Dive into the 'Investigator' and 'Competitor' Consumer

Utilizing ethnography (systematic study of people and cultures from the point of view of the subject) to study consumers behavior is not new, however it is typically used to study small groups of individuals' behaviors directly. Digital ethnography is new because of the scale of data and sample size, collecting the data online, and analysis into values-based archetypes instead of traditional segmentation of consumers.

The CCFI digital ethnography study examined the online behavior of 9,200 Canadians ages over a six month period beginning on September 15th, 2018 ending on March 15th, 2019.

GOALS

- To understand key characteristics and views of each specific archetype
- Best practices for developing strategies to connect with Canadians based on their digital ethnographic group

3. Online Conversations: What Messages Resonate with Canadian Consumers

Using artificial intelligence software, thousands of publicly available online conversations were analyzed over an 18-month period from January 2018 to June 2019. Over 250,000 Canadian profiles were reviewed to understand overall sentiment on hot button food issues such as genetically modified organisms (GMOs), hormones, etc. and what messages around these topics resonate with consumers.

GOALS

- To uncover how Canadians are discussing topics relating to Canada's food system
- Identify key messages that resonate with Canadian consumers

We welcome your input and feedback for future ideas relating to our research as this research is designed to help all those involved in Canada's food system earn public trust by building consumer confidence in our food system.

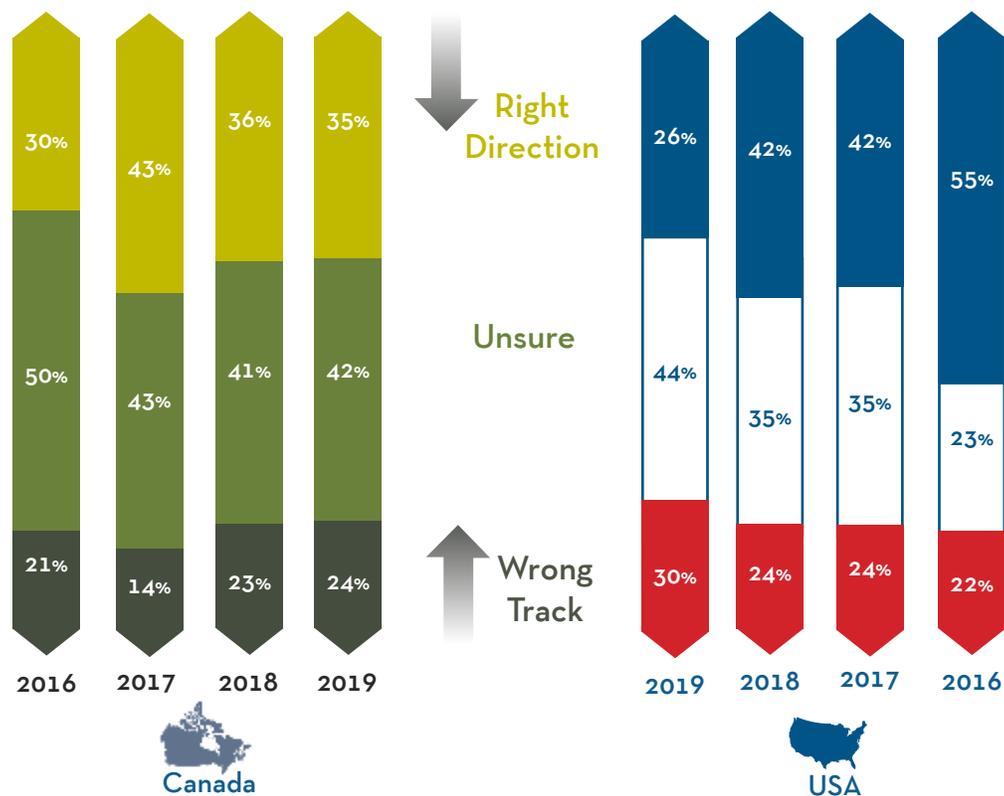


Look for the light bulb throughout the research report for insights and tangible take-away tools.

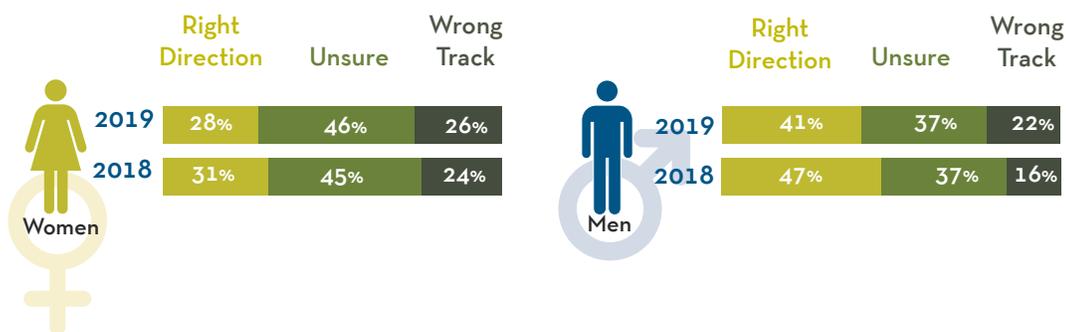
ARE WE HEADED IN THE
RIGHT DIRECTION?

PUBLIC TRUST TRACKING: KEY ISSUES WITHIN CANADA'S FOOD SYSTEM

After previous years showing changes in the results, the 2019 research is consistent with last year's data that shows that only one in three Canadian consumers believe Canada's food system is headed in the right direction. Fortunately, the percentage of people who feel the food system is going in the right direction out numbers those who feel the food system is headed down the wrong track. The key with this tracking data is to note that the highest percentage of the population fits within the 'Unsure' category.



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

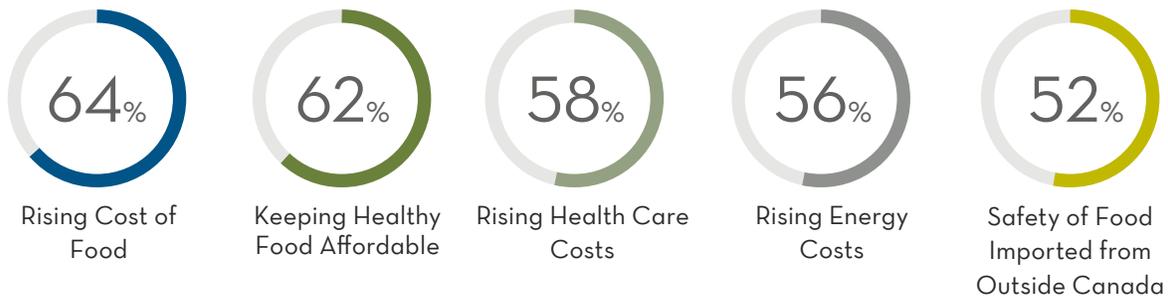


Did you see the significant change in US results in 2019? The US CFI Team explained that there has been an overall increase in social anxiety and concern due to the ongoing contentious political environment and the uncertainty it creates. Americans are having to re-orient themselves to a new reality on a regular basis and that is causing more social dissonance which is reflected in more cautious or negative sentiment on many surveys.

5 TOP FIVE ISSUES

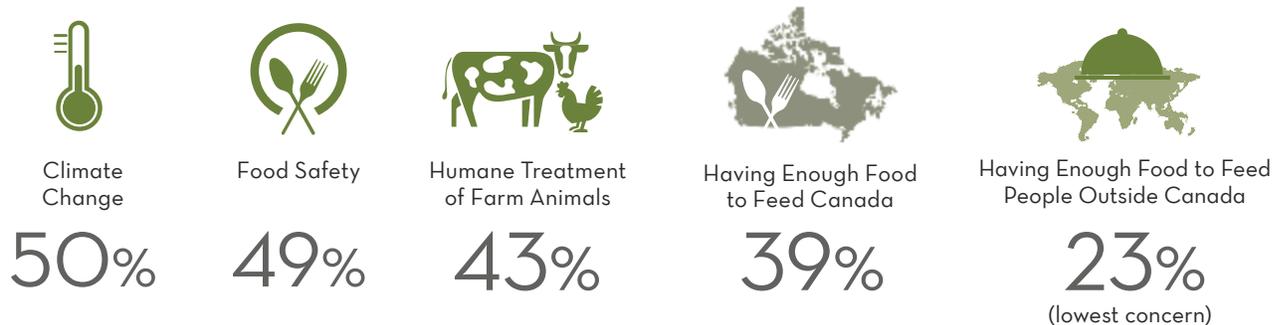
Survey participants were asked to rate their level of concern on several life issues including broad areas relating to health care costs, unemployment, food safety and food affordability. This is asked at the beginning of the study to provide context for food system issues.

Consistent with previous findings, the **rising cost of food** is the top concern for the fourth year in a row at 64% with **keeping healthy food affordable** following at a close second with 62%. The categories for **rising health care costs** and **rising energy costs** still rank as top concerns for Canadians but are down significantly compared to 2018 research data.



* Numbers reflect the percentage of those who selected an 8-10 (strong agreement) rating from a scale of 0-10.

MORE CANADIAN FOOD SYSTEM CONCERNS



* Numbers reflect the percentage of those who selected an 8-10 (strong agreement) rating from a scale of 0-10.

To take into consideration ...



When separating results by gender, women were more concerned about all topics compared to men.



For the life concerns mentioned above, the 55+ year old age demographic was more concerned with these issues compared to younger Canadians.



Overall, the level of concern Canadians report having for most issues has softened, year-over-year, with a slight shift of opinions from the highly to moderately concerned category.



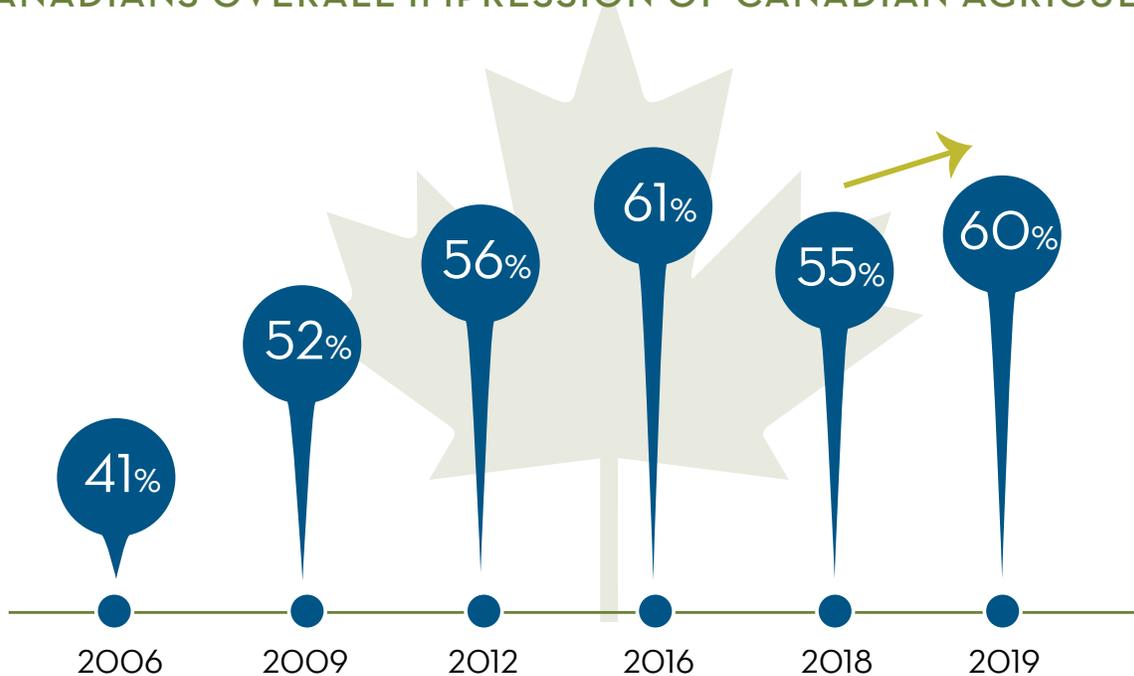
Regardless of consumer's individual choices, most Canadians want healthy, affordable food. Share the message of what innovative efforts you see being used to keep costs down for consumers.

IMPRESSIONS OF CANADIAN AGRICULTURE

Based on personal experiences, knowledge and comfortability with certain topics, individual words and phrases resonate differently with each person. To understand how Canadians feel about agriculture compared to the entire food system, we separated the concepts.

Approximately three in five Canadians view agriculture in Canada **positively**. While there has been a significant reduction in the proportion who view the industry **negatively**, this movement has coincided with an increase in the number of Canadians who report **not knowing enough** to offer an informed opinion.

CANADIANS OVERALL IMPRESSION OF CANADIAN AGRICULTURE



% = Very Positive/Positive

Arrow indicates significant change compared to last year.



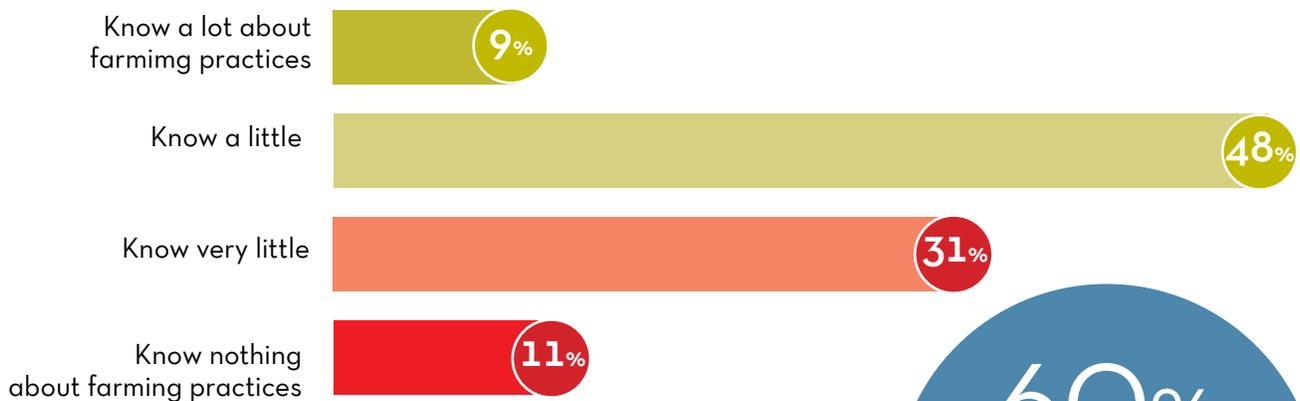
7% of Canadians do not feel informed enough about agriculture to know if they feel positive or negative towards the Canadian agriculture industry. Our job as partners within Canada's food system is to provide Canadian consumers with credible information and deliver resources that enable them to make well-informed decisions about their food choices.

MODERN FARMING PRACTICES

91%

Know little
or nothing

Canadians were asked if they knew anything about modern farming practices to understand their personal knowledge base on the topic. A total of 9% indicated they **knew a lot**. Together, a large proportion (91%) of Canadians claim they know little, very little or nothing about modern farming practices. Since 2016, these results of claimed knowledge are virtually unchanged.



When asked if consumers are interested in knowing more about agriculture, **60%** of respondents indicated 'Yes' and **40%** indicated 'No'.

60%
of Canadians
are interested in
knowing more!

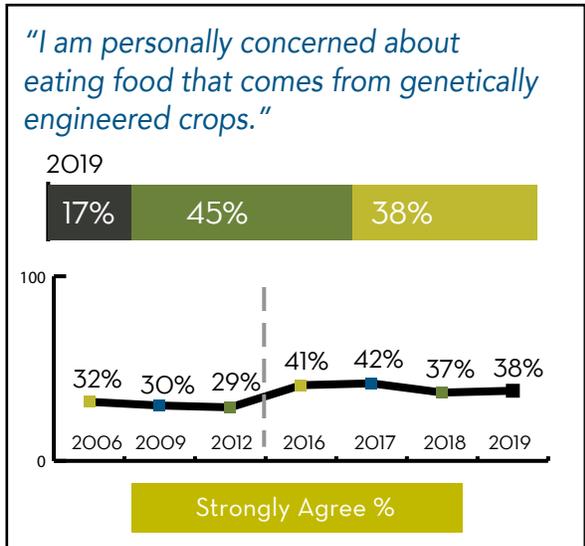
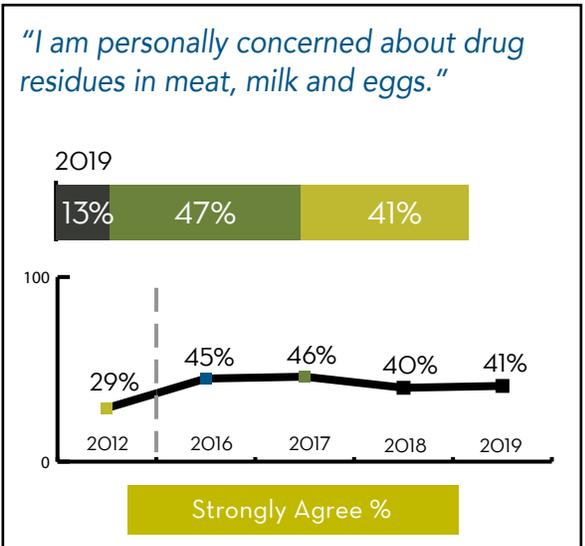
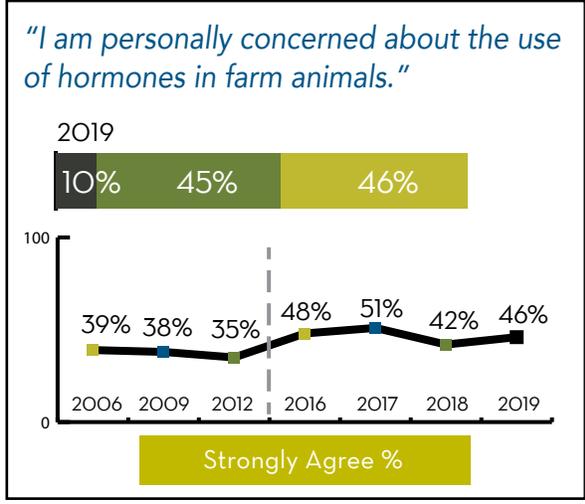
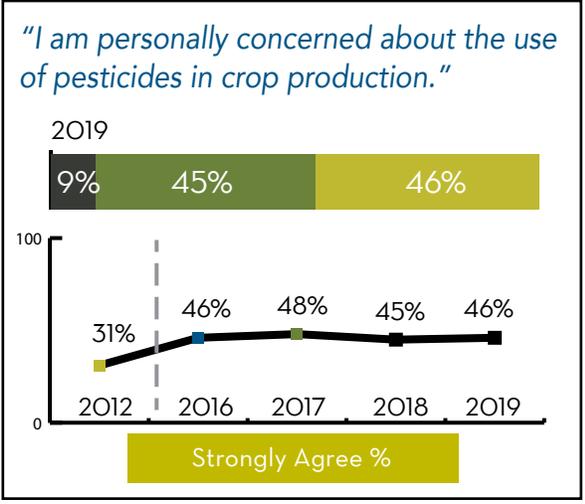


Opportunity knocks. Three in five Canadians are interested in knowing more about agriculture. Consumers are asking for information about modern farming practices and how their food is grown, which is an opportunity for the agriculture industry to provide transparent and accurate material that demonstrates best practices.

PUBLIC ATTITUDE TRACKING OVER TIME

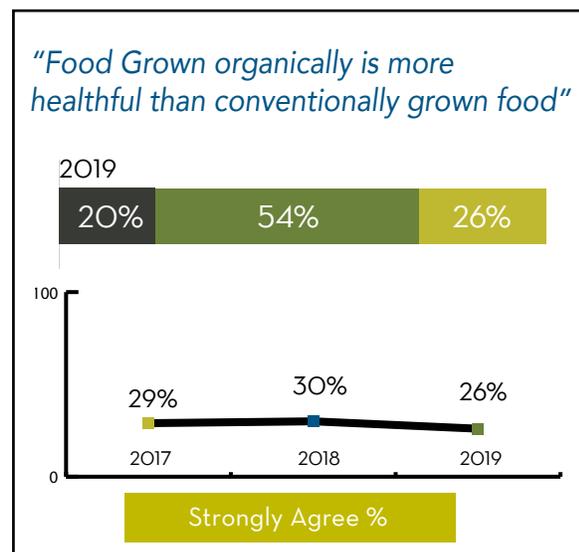
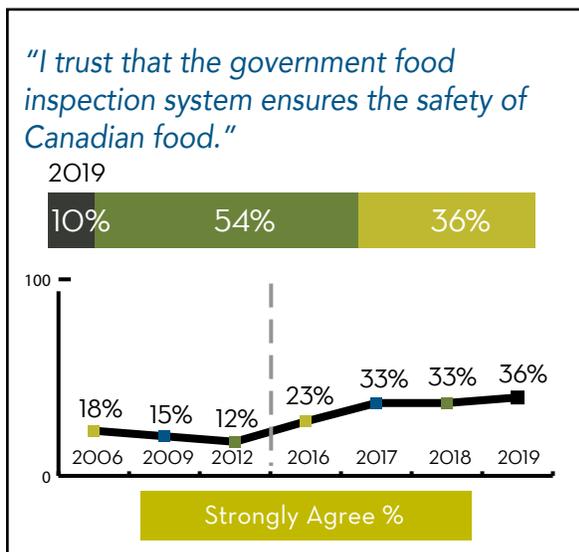
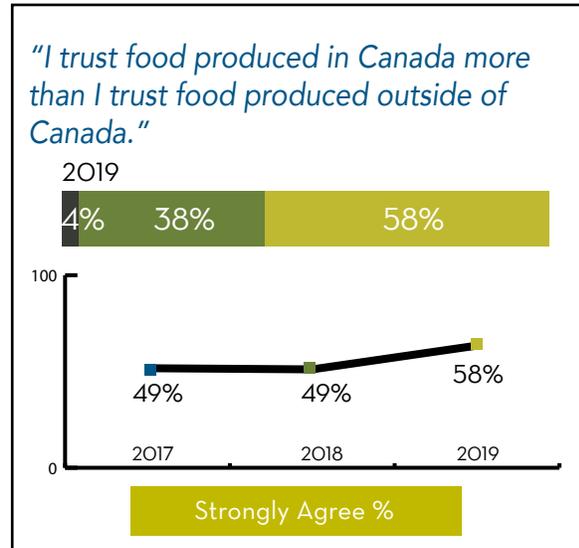
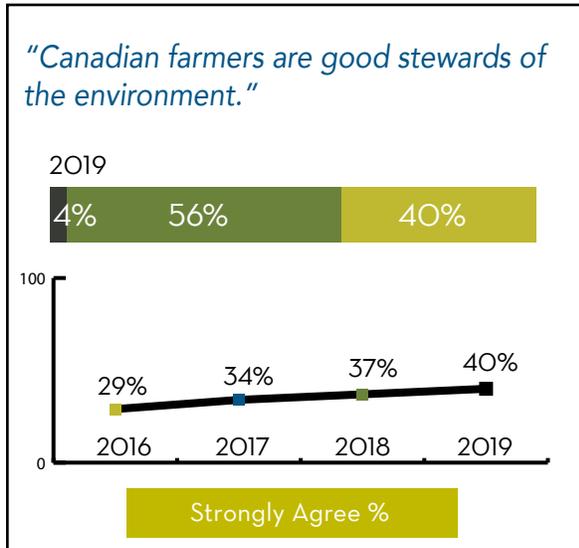
CCFI's research tracks Canadians' attitudes on food system issues over time, with some questions dating back to 2006. This tracking enables Canada's food system to determine trends and hot topics over time.

Canadians are more trusting of food produced in Canada than anywhere else in the world.



Since 2016, CCFI has used a 0 to 10 scale relating to these questions to allow for North American comparison. Some questions have data going back to 2006 however, that data is based on a 5-point scale, so comparisons are not direct but still are insightful for tracking purposes.

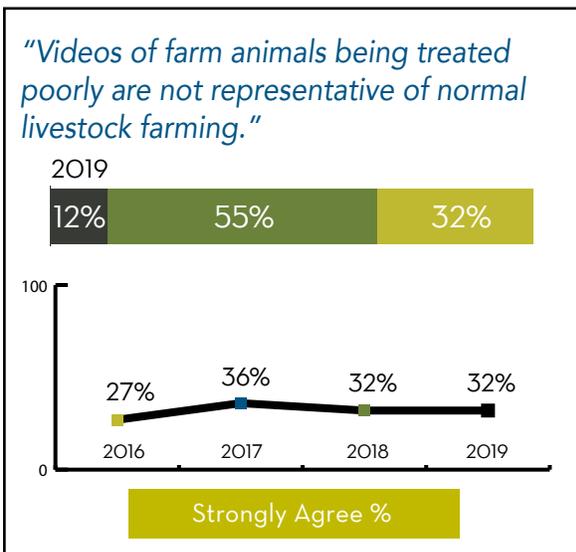
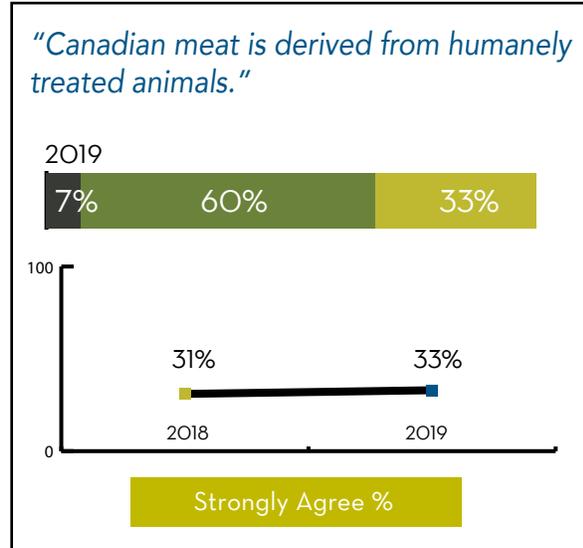
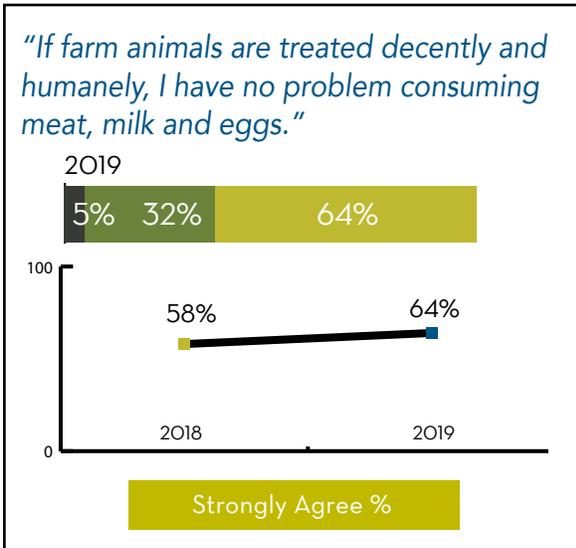
← LEVEL OF AGREEMENT →



Stay tuned for updates on these emerging trends in the 2020 research. Consumers are starting to look more closely at food labels and are asking questions about what certain labels mean.

2016-2019 trend numbers reflect the percentage of those who selected an 8-10 (strong agreement) rating from a scale of 0-10. 2006-2012 numbers reflect the percentage of those who selected "strongly agree" from a 5-point agreement scale. Percentage may total more than 100% as graphs contain whole percentages that are rounded.

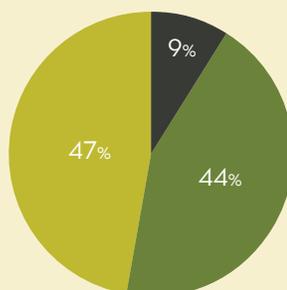
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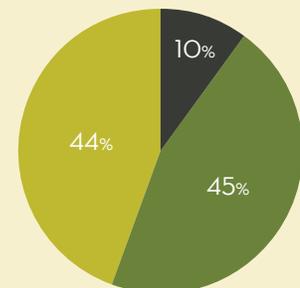
A clear majority and a significantly higher proportion of Canadians compared to a year ago, agree that they have no problem consuming meat, milk and eggs provided if farm animals are treated decently and humanely. The research demonstrates an opportunity to provide information to consumers on best practices for animal welfare and show what values Canadian livestock farms operate under.

NEW TRACKING TRENDS

"I am personally concerned about misleading food labels or descriptions for the purpose of marketing."



"I am personally concerned about food fraud – the practice of mislabelling, adulterating or counterfeiting food products."





WHO DO CANADIAN
CONSUMERS TRUST?

TRUST.

We asked Canadian consumers to evaluate their top trusted sources for information relating to food and their food choices. When building communication strategies to connect with consumers, understanding who should be delivering key messages is crucial for effective and successful implementation to ensure they resonate with the intended target audience.

The top spot of who Canadian consumers trust the most belongs to farmers. Canadians trust farmers to provide them with accurate information about their food. University researchers and the broader Canadian agriculture sector also hold a high degree of trust compared to other sources such as restaurants, government and food processors.

“ If you want to go fast, go alone; if you want to go far, go together ”

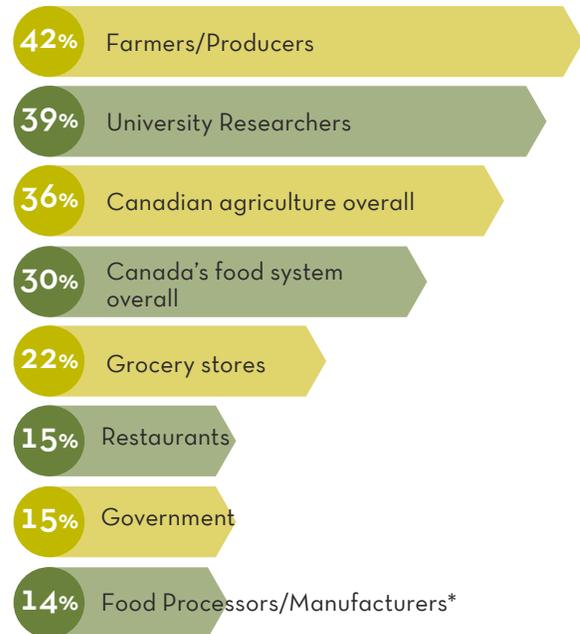
RESPONSIBILITY.

Not surprisingly, most Canadians think farmers/producers, food processors/manufacturers and the government/government agencies have a high degree of responsibility to provide credible information on how food is grown or produced. In fact, fewer than half of Canadians see any other group as highly responsible for providing this information on how food is grown or produced, including just three in ten, who feel this way about advocacy groups.



Although grocery stores and restaurants are not held responsible to provide credible information, they can be important vehicles for sharing. The more accurate information available to Canadians, the better.

Who Canadians trust in Canada's food system



* Food processors/manufacturers includes agribusiness suppliers

Who Canadians hold responsible to provide credible information



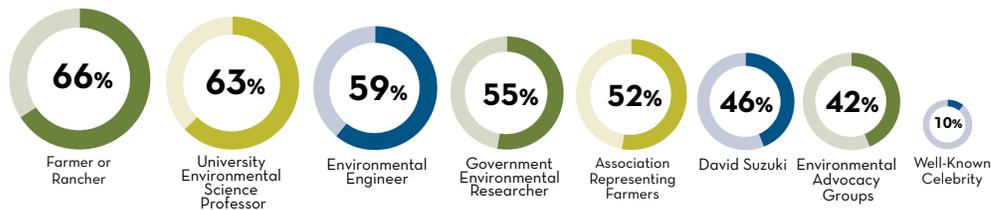
* Food processors/manufacturers includes agribusiness suppliers

WHO DO CANADIANS TURN TO FOR INFORMATION ON FOOD?

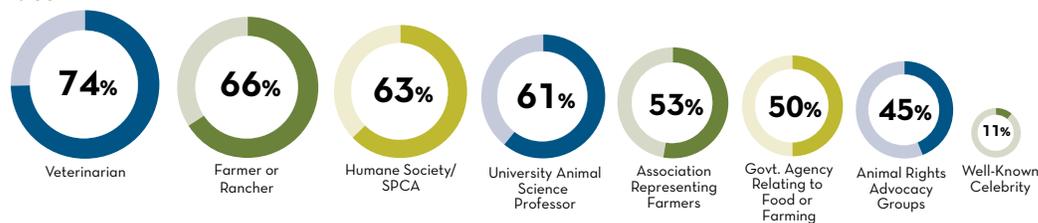
Canadians were asked to rate which sources they found most credible for accessing information about their food. The numbers represent the percentage of the Canadian population that rated the specific source as 'very believable' or 'somewhat believable' on a 6-point scale.

When it comes to **farming and environmental issues**, farmers are viewed as most credible, followed closely by professors, environmental engineers, researchers, and associations representing farmers.

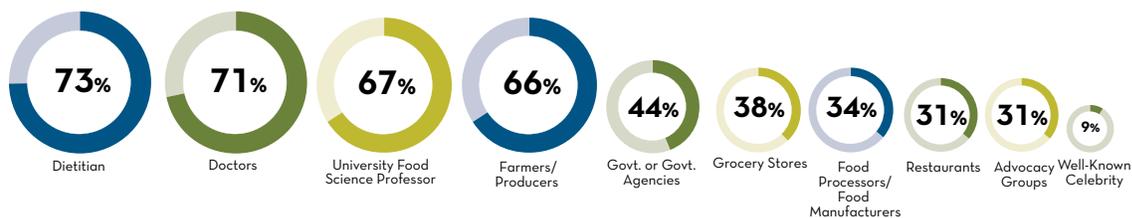
Fewer than half view someone such as environmental activist like David Suzuki or advocacy groups as believable and just one in ten would trust the opinion of a well-known celebrity when it comes to farming and the environment.



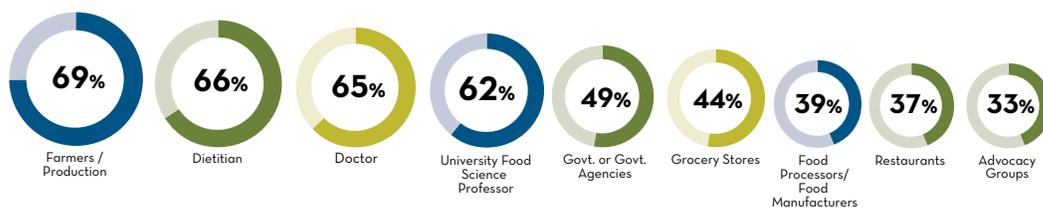
Three-quarters of Canadians trust the opinion of veterinarians on **farming and animal welfare issues** and around two-thirds view farmers, a humane society or university professors as credible sources of information. Less than half think advocacy groups are believable and just one in ten feel this way about celebrities.



Over seven in ten Canadians trust the opinion of dietitians and doctors when it comes to **farming and nutrition issues**. Two-thirds would also describe university professors and farmers as believable. By contrast, just one in ten think well-known celebrities are credible sources of information when it comes to farming and nutrition.



Most Canadians view farmers as credible sources when it comes to **farming & food safety issues** and around two in three would describe dietitians, doctors and university professors in this way. Believability scores are lowest for food processors, restaurants and advocacy groups.



Depending on the food related topic, Canadian consumers look to different sources for information. When building marketing strategies and communication materials to resonate with your intended audience, look at who could be the most credible source of information to speak to that food.



WHAT MAKES FOOD
INFORMATION CREDIBLE?

2

DIGITAL ETHNOGRAPHY: A DEEPER DIVE INTO THE ‘INVESTIGATOR’ & ‘COMPETITOR’ CONSUMER ARCHETYPES

In CCFI’s 2018 research, an innovative approach described as digital ethnography was used to observe online behaviours of 9,200 consumers to understand their behaviors, beliefs, values, and fears.

By tracking online behaviours of consumers, it takes the bias and potential inaccuracy out of the answers. When you place a question in front of a participant, they may be trying to answer as truthfully as possible, but they are also writing down the answer that they believe you may want. By analyzing online behaviours, you can evaluate consumer beliefs and trends that they might not even be aware of themselves.

Through this research, five different consumer archetypes were revealed:

Challenger	Investigator	Institutionalist	Follower	Competitor
 <p>Food news is symbolic of... The fight for what is right</p>	 <p>Food news is symbolic of... Solid research clearly presented</p>	 <p>Food news is symbolic of... Strong public institutions</p>	 <p>Food news is symbolic of... Majority rules</p>	 <p>Food news is symbolic of... Market competition</p>
<p>Looks for information that aligns with their position on the issues/causes that they care most about. They are very conscious of, and conscientious about, their food choices. They’re constantly on the look out for unknown connections between food and human well-being.</p>	<p>Trust in the scientific method and consider themselves to be rational and unbiased, driven by logic and facts. They tend to look for information that can be scientifically and independently verified.</p>	<p>Believe in and follow information that has been endorsed by government sources and regulatory authorities. They will follow all government-sanctioned policies and practices around the consumption of food.</p>	<p>Tend to follow and believe anything that is widely adopted by other people, especially their friends. Follow popular shows, TV and media to get the latest information about food and health and are especially interested in the news that relates directly to their own issues.</p>	<p>Believe in using a combination of their own common sense, personal practice and industry advice to filter out what food information is credible. Prefer following industry advice about food consumption and health, rather than heeding the advice of government authorities.</p>

Building on these 2018 research insights, the 2019 research focused more specifically on the **Investigator** and **Competitor** consumer archetypes to gain a deeper understanding of these two specifically.

WHY THE INVESTIGATOR AND COMPETITOR?

During the first phase of ethnographic research, it was determined that the ‘Investigator’ has the most influence on the other archetypes, especially the institutionalist and follower archetypes. The ‘Investigator’ is most likely to trust third party, non-profit information and their trust is key to sharing our message with the other archetypes.

The ‘Competitor’ was chosen because they are most likely to trust food companies. Understanding best practices for connecting with this group is beneficial to those in the food system.

To design the blueprint and understand the most important jobs for each archetype, data over a six-month period was analyzed from 8+ online digital channels such as Facebook, YouTube, Pinterest, etc. For each archetype, over 1,000 user profiles were examined to understand their rituals, habits, and patterns that consumers tend

to make when engaging with food news and information.

First, the data points (12,000+) are qualitatively examined to determine the most common positive characteristics shared by the most loved delivery mechanisms and then the most negative points are examined along with options that trigger a negative response. The patterns were then tested against a new random sample of 50 product related conversations until each observation hit its “saturation point”.

Framework: Consumers utilize food news and information to get specific jobs done or form solutions. To innovate, Canada’s food system needs to understand what jobs, specific archetypes of consumers need done, the desired outcome and where they are currently seeking out information.

The research revealed 3 different types of jobs that each consumer attempts to fill.

Job Type	Archetype Example (Investigator)	Designing a Bathroom Example
Functional	The want to counter an argument using evidence from a reputable source.	The desire for functionality in the bathroom design.
Emotional	The want to feel superior to others.	The desire for a calming and comfortable room for family.
Social	They want others to see them as a source of knowledge.	The desire for visitors to comment about the beautiful bathroom design.

INVESTIGATOR



The **'Investigator'** values the scientific method; they feel that information should be peer-reviewed by credible scientists or academic sources. They look kindly on government produced information but feel it is lagging behind current research and look to academic institutions and organizations to help separate pseudoscience from credible material.

Top Functional Jobs

- 91% I want to understand the science and nutritional benefits behind the latest food trends.
- 87% I want to counter an argument using evidence from an academic or reputable news source.
- 81% I want to see how bad a specific brand of prepackaged food is to my health.
- 80% I want to quickly assess the validity of a claim I see made on social media.
- 74% I want to find evidence-based information I can use to encourage others to eat better.

Top Emotional Jobs

- 89% I want to feel like I am well-informed.
- 86% I want to feel like I am in control of my health and well-being.
- 79% I want to feel like I am superior to others.

Top Social Jobs

- 86% I want others to see me as a source for knowledge.
- 84% I want others to see me as someone who is not easily duped.
- 78% I want to be seen as someone who is healthy and fit.

The percentage represents the number of individuals within the archetype sample (1,000+) who chose to seek out the specific topic within the 6-month period.

WHERE DO THEY LOOK FOR INFORMATION?

'Investigators' look to resources such as CBC News, the Arrell Food Institute at the University of Guelph, Canadian Medical Association Journal and The Agenda with Steve Paikin, as examples.

Opportunities

In order for information to resonate with the 'Investigators' in our population, there are key components that the messaging should employ:

1. Peer-reviewed research with clear methodology, independent funding and authors with recognized credentials.
2. Information that is clear, bold and potentially against the grain or vested political and economic interests.
3. Messaging that is mostly text based with scholarly wording and uses scientific rigor to investigate counterarguments.

Barriers

When designing and distributing content for the 'Investigator', be sure to understand the audience.

1. 'Investigators' will not look to social media or popular media platforms due to the suspect of profit motive.
2. This group chooses to ignore information that focuses on the style of the content and content that appears to be emotional and trendy.
3. 'Investigators' also steer clear of information that sounds biased or partisan and content that appears to be over simplistic.



COMPETITOR



The **‘Competitor’** believes strongly in freedom of thought, choice, and their own ability to judge things and decide for themselves. They trust the marketplace as the best arbiter of information and news. ‘Competitors’ use market competition to evaluate products or services because they believe that people simply will not buy ideas or products that do not work. They distrust government because it is slow moving and non-governmental organizations (NGOs) because they see them as special interest groups. ‘Competitors’ want to follow their own common sense and use marketplace competition to determine what is credible information.

Top Functional Jobs

- 88% I want to validate the choices I am making when it comes to the food I consume.
- 82% I want to find solutions that will help me lose weight.
- 72% I want to contradict someone who is trying to get me to change my eating habits.
- 70% I want to find a quick fix to help me solve a health condition.
- 67% I want to support the local economy/Canadian production and eat food from my region.

Top Emotional Jobs

- 81% I want to feel less guilty about the food I eat.
- 72% I want to feel like I am right in my convictions.
- 59% I want to feel like I am protecting our traditions.

Top Social Jobs

- 82% I want others to see me as a good partner/provider.
- 76% I want others to see me as traditional and conservative.
- 66% I want others to see me as strong/attractive.

The percentage represents the number of individuals within the archetype sample (1,000+) who chose to seek out the specific topic within the 6-month period.

WHERE DO THEY LOOK FOR INFORMATION?

'Competitors' look to resources such as CTV News, Kraft Canada, Canadian Living Magazine and Dairy Farmers of Canada, as examples.

Opportunities

In order for information to resonate with the 'Competitors' in our population, there are key components that the messaging should employ:

1. Simple content designed to be relatable, that is developed by leaders in the food industry and represents a similar geographical region to them.
2. Branding that is strong, approachable and presents a feeling of being successful with a proven track record.
3. Messaging that recognizes the importance of individual choice, has bold messaging and is packaged with a professional and bright coloured design.

Barriers

When designing and distributing content for the 'Competitors' be sure to understand your audience. Competitors steer clear of:

1. Content that challenges their own beliefs, is positioned as superior/elitist, and information that is from a progressive source.
2. Information that portrays a "crunchy" or "hippie" vibe, ultra-trendy branding and information that is conventional and afraid to 'rock the boat'.
3. Distribution channels that are technology heavy, use scientific jargon and promote bureaucratic thinking that threatens their individual autonomy.



The differences between the 'Investigator' and 'Competitor' are clear. Communication tactics relating to these two types of consumer archetypes should be designed to reach a certain audience. The 'Investigator' archetype is an important segment to understand and connect with. Their influence of institutionalists and followers mark them as representing a large portion of the Canadian population. If you want to share your product with the 'Competitor', work to include taglines like "#1 Consumer Voted Product" and if you want to connect with the 'Investigator,' include details of the innovative research that went into the product. Understanding the target audience and the characteristics of each archetype is the key to success when communicating food-related information to each of these consumer archetypes.

A photograph of a man and a young child sitting at a desk with a laptop. The man is on the left, wearing a white shirt, and is holding a white cup to his mouth. The child is on the right, also wearing a white shirt, and is looking at the laptop screen. The man's hand is on a mouse. The background is a simple room with a window and curtains. The text "WHAT'S IMPORTANT TO CANADIANS?" is overlaid in white, bold, sans-serif font in the center of the image.

WHAT'S IMPORTANT TO
CANADIANS?

ONLINE CONVERSATIONS: WHAT MESSAGES RESONATE WITH CANADIAN CONSUMERS?

Many of the traditional messages around hot button food topics such as GMOs, pesticides, hormones, and antibiotics in fact do little to move the needle on public acceptance. Previous research conducted by CCFI has found that traditional messages (such as “improves global nutrition” or “helps feed a growing world”) do not resonate with the general public.

So, we set out to ask, what kind of language really could change negative opinion?

This builds from our public opinion research in early 2019 which found that how people talked about these topics varies significantly. More than 2 million Canadians were discussing the subject of whether GMOs in food were bad and more than 1 million on the subject of whether pesticides in food are bad. However, there was not two sides engaged in a debate over the technology. Instead, two groups of people were engaged in separate monologues.

To build on these findings, the research set out to evaluate whether messages have the potential to shift Canadians’ views **if they used the other side’s language.**

We used artificial intelligence (AI) software and analyzed real life data of social media postings. To ensure privacy, researchers only had access to aggregated data that was publicly available. This research used a representative sample of over 250,000 Canadians within an 18-month period throughout 2018 & 2019. The tool works to detect patterns in how people think about topics and then forecasts and predicts how people could react when a certain message is used to explain one of the topics.

The AI research tool avoids introducing biases by not asking questions. Asking people a question naturally causes them to develop opinions on subjects they did not necessarily care about before. The AI tool can passively monitor its sample population, waiting for them to voice their opinions rather than inciting them to develop one.

For example, knowing how Canadians feel about GMOs and how they feel about food affordability, the tool can predict how they could respond when GMOs are explained as making food more affordable. The data showed that talking about how GMOs make food more affordable actually **decreases opposition to the idea that GMOs in food are bad.**

This creates a paradox. CCFI’s polling data (page 6) found that 64% of Canadians are concerned about the rising cost of food. How can people say food affordability is their most important issue but be more opposed to GMOs when told the technology makes food more affordable?

One explanation comes from the language people are using. The AI software uncovered that when people talk about food being less expensive, there is a strong overlap with terms such as ‘low quality’. Therefore, by emphasizing GMOs role in reducing food costs, there’s a possibility that we’re inadvertently inviting people to think of GMOs as reducing the quality of the food.

GMOs

Overall, the statements that shifted the results and could potentially make Canadian consumers shift to support GMOs were that they **helped to reduce green house gases/fight climate change**, and that they **allowed farmers to use less pesticides**. By explaining that GMOs help to solve global food shortages and increase food nutrition did not shift opinions.

Antibiotics

Two key messages that resonate and elevate the support of antibiotics were that antibiotics **improve food affordability** and **regulators assure food safety**.

Pesticides

The messaging that made the AI software predict that consumers could potentially shift to positive opinions on pesticides were that they **decrease exposure to food contaminated with harmful micro-organisms** and **help to reduce greenhouse gases/fight climate change**. As with GMOs, providing messaging that explained that pesticides help solve global food shortages had no effect.

Modern Farming

Through looking at the support for modern farming among Canadians, overall the response was positive. When introducing messaging that **animal welfare is highly regulated** and **farmers care about their animals**, the software predicted a slight shift towards an increase in support of modern farming.



Many traditional messages aren't working, and in some cases make things worse. The research provides insight as to the language you need to speak to connect with the values of the intended people you're trying to reach and target. Many of the people concerned about GMOs and pesticides are even more concerned about the impacts of climate change. By showing the role that GMOs and pesticides play in fighting climate change, Canada's food system may be able to reach the more than 2.5 million Canadians who are currently engaged on the topic of agriculture and climate change.



NEXT STEPS

WHAT WE **LEARNED** FROM THE 2019 RESEARCH

1. The Public Trust Tracking data shows that only **one in three Canadian consumers believe Canada's food system is headed in the right direction with 42% being unsure.** When Canadians were asked about their overall impression of agriculture, **60% view agriculture in Canada positively with a growing number of Canadians reporting they didn't know enough to comment on this question.** When surveyed, **3 in 5 Canadians show interest in knowing more about agriculture and modern farming practices in Canada.** Together, these results demonstrate the opportunity to share credible information, connect with Canadians and enable them to make informed decisions about their food.

When it comes to who consumers trust and hold responsible for providing information on how food is grown – the answer is consistently **farmers.**

As consumers become more engaged in conversations about food, the more they demand credible information.

Canadians want information straight from the source, right from the farmer's mouth. As an industry, the more we can share insightful stories from the farm and the individuals who grow our food – the more we can connect with the consumers who are purchasing food products.

Trends to watch – Stay tuned.

- 47% of Canadians are concerned about misleading food labels
- 44% are concerned about food fraud
- There was a 4% decrease in the number of Canadians who believe food grown organically is more healthful than conventionally grown food compared to 2018

2. Why sort Canadians into ethnographic groups? When developing effective communication strategies, it is important to understand the target audience and cater the messaging towards that particular group. Communication strategies for a family with three kids looks different than messaging designed for a single male early in his career.

The **'Investigator'** archetype relates to **scientific terminology, peer-reviewed sources, text-based graphics with minimal design elements and non-biased information.** In comparison, the **'Competitor'** archetype **prefers simple content that demonstrates the product's marketplace share, has bold messaging with a bright coloured design.** The key is understanding your target audience and applying the appropriate communications strategies and tactics.

3. What messages help the food system connect with Canadians? Using prediction software and artificial intelligence, a top sentiment that has the potential to shift Canadian consumers from a negative stance was revealed. By sharing that **different technologies and tools used in agriculture can allow farmers to reduce greenhouse gases and fight climate change,** the potential to shift perceptions from negative to positive is increased.

WHAT'S NEXT?

You have read through the 2019 research, thought it was interesting, and are motivated to make a change – now what?

Through CCFI's research, we want to enable and empower Canada's food system to collaborate and work together to further build public trust. CCFI coordinates this research to benefit the entire food system – from individual farmers to food retailers and everyone in between along the value chain. Share the graphs, tweet the statistics and use this information outlined in the 2019 Public Trust Research as a resource for your organization and as tool to help others in your network.

Turn up the Transparency

Work to shift your networks' communication strategies to be more transparent. Consumers understand that everyone makes mistakes. Share your stories of improvement, demonstrate how you are implementing best practices and don't be afraid to share the progression of your organization in telling your story. Admitting that you aren't perfect all of the time and that you are working to improve daily, demonstrates to Canadians that you are sharing the real story and working to connect with them using shared values.

Elevate the Positive Messaging

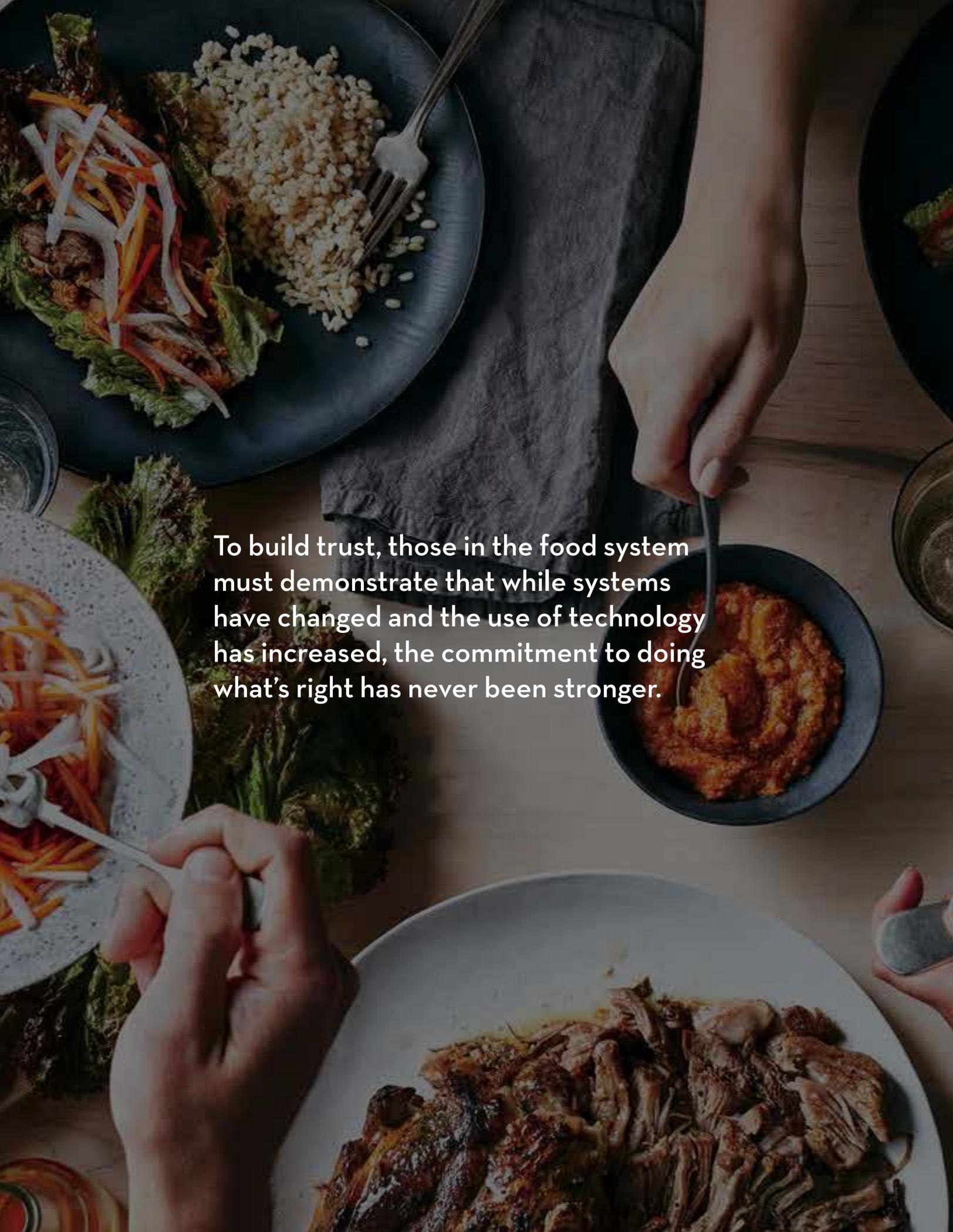
With the increasing number of Canadians who are 'unsure' about agriculture and Canada's food system, there is a need to create and promote information in a positive way. Especially on social media, many people share a negative news story and then write a short comment about the inaccuracies of the article. The article is what gets one more share, potentially hundreds more reads, and the negative messaging continues to reach more eyes, not the short accurate comment. We need to share the good stories, write about how best practices are improving and how agriculture is working to become even more innovative for the benefit of the Canadian consumer.

Collaboration is Crucial

We all work to share our story, our latest technology, our version of credible information. To increase public trust of agriculture overall in Canada's food system, **there is an apparent need to work together and collaborate on efforts to reach a larger audience and increase the impact of the messaging.** Using the 'Investigator' archetype as an example, understand that some efforts may be discounted as marketing or biased information because of the brand that is on the advertisement or social post. This may mean taking your logo off the newest campaign or distributing the key messages of another commodity. If we can increase public trust in Canada's food system as a whole, the entire industry will benefit together.

Deciding the Tactics and Platforms to Communicate

Write an op-ed. Record an interview. Make a video. Tweet. Post. There are numerous channels and ways to get your message out. The key is to understand who's looking at which channels and which platforms they prefer. If you want to reach a younger audience, create edgy videos and promote on social media. To reach commuters, post advertisements on public transit options. To reach moms, utilize prominent influential bloggers to share your message on platforms such as Instagram. The goal in the end should be to create and share credible and relevant stories and content that reach as many consumers as possible to help enable Canadians to make informed decisions.

A top-down view of a dining table with various dishes. In the upper left, a dark plate contains white rice and a salad of shredded carrots, onions, and lettuce. A hand holds a fork over the rice. In the lower left, a white plate has a salad of shredded carrots and onions, with a hand holding a fork. In the center, a dark bowl contains a thick, orange-red sauce, with a hand holding a spoon. In the lower right, a white plate is filled with shredded, saucy meat. A hand is visible holding a spoon near the bottom right. A grey cloth is draped across the middle of the table. The background shows a wooden table surface and other plates and glasses.

2019 CANADIAN PUBLIC TRUST RESEARCH ADVISORY PANEL

A special thanks to the following CCFI Research Advisory Panel members for sharing their insights and expertise related to the 2019 Public Trust Research and beyond. Look for more from this Research Advisory Panel as CCFI works to expand communications to include research from the panel members and other efforts related to public trust moving forward.

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Funding for this research comes from the shared investment of all 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. Additional insight, segmentation, provincial data and detail is available to CCFI members.

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

CONNECTING WITH CANADIANS

The Canadian Centre for Food Integrity coordinates this research for the benefit of the Canada's food system and those interested in conversations about food and how it's produced. A better understanding of Canadian consumers' views, expectations and their interest in learning more is the foundation needed to increase public trust in our food system. This research is meant to be shared broadly and put to work by the entire Canadian food system.

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