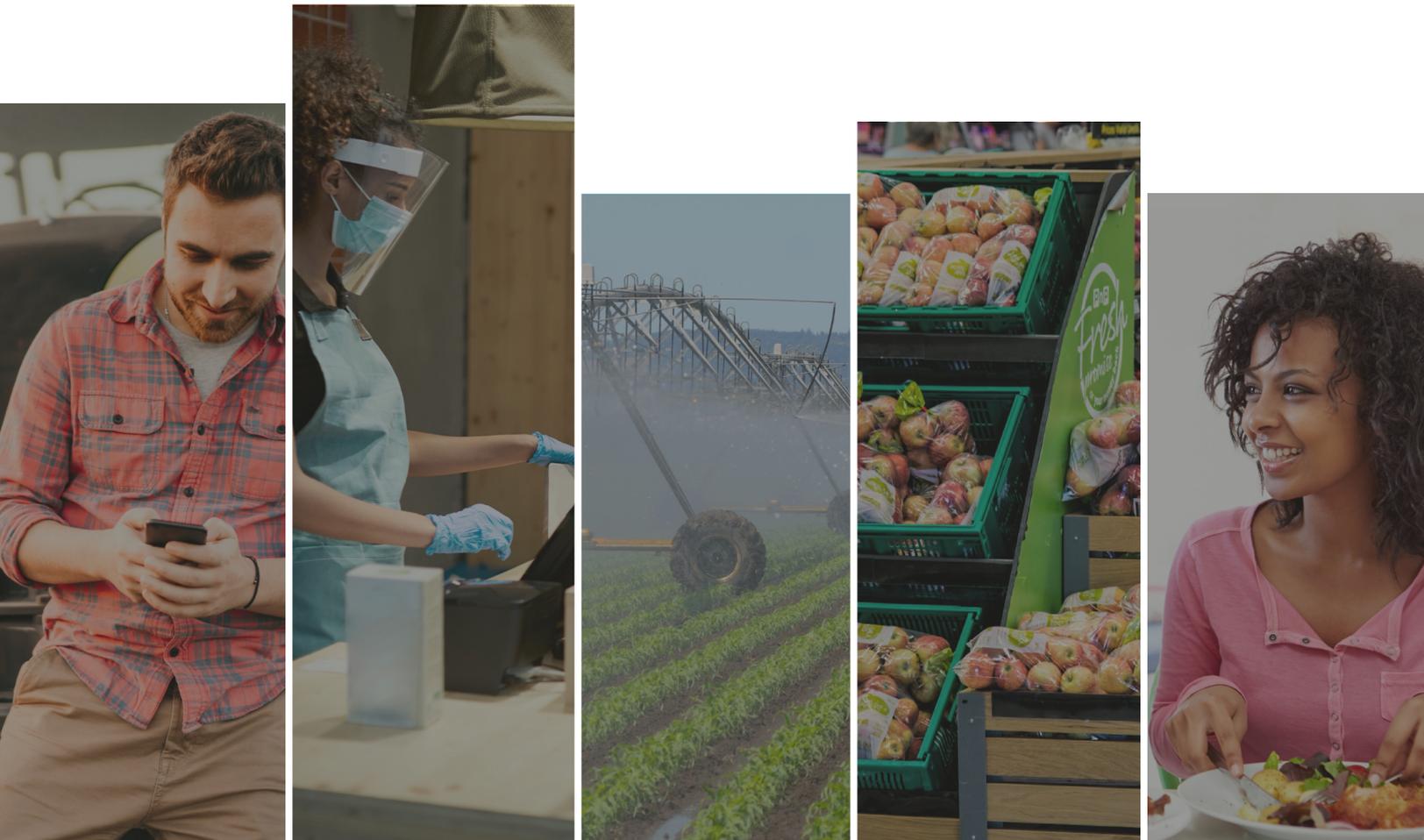




THE CANADIAN CENTRE FOR
FOOD INTEGRITY

TRENDS IN TRUST & THE PATH FORWARD





THE CANADIAN CENTRE FOR
FOOD INTEGRITY

The Canadian Centre for Food Integrity (CCFI) is a national charity whose mandate is to help Canada's food system earn public trust by coordinating:

RESEARCH, RESOURCES & DIALOGUE

CCFI empowers those in the food system to meaningfully engage with Canadians on issues they care about in support of building public trust.

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

Come to the table and help Canada's food system earn trust for the future.

JOIN. INVEST. DONATE.

www.foodintegrity.ca

@FoodIntegrityCA

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THE 2020 RESEARCH



THE 2020 RESEARCH

The Canadian Centre for Food Integrity's 2020 Public Trust Research provides a multifaceted understanding of public trust in Canada's food system. Our annual public trust survey - now in its fifth year - is a strong, foundational resource. The global pandemic has illustrated that priorities can change drastically, and our tracking research provides balanced context on public opinion before, during, and after COVID-19. CCFI aims to be a trusted resource and has expanded the scope of our report to highlight other public trust-related research as well as compile and report on performance metrics related to the food industry's efforts to build public trust.



METHODOLOGY

1. Public Trust Public Opinion Survey

The 2020 survey was conducted on behalf of CCFI by Ipsos Public Affairs and collected results from a sample of **2,903 Canadians** from July 28th to August 27th, 2020. A total of n=2,703 completed the survey online and n=200 Prince Edward Island residents completed the survey by telephone.

The sample is representative of the general Canadian population aged 18 years or older. The precision of online polls is measured using a credibility interval. In this case, the results of this research are accurate within +/- 2.1 percentage points or 19 times out of 20 if all Canadian adults had been polled.

Significant differences between 2020 and 2019 research have been designated as follows:

-  Significantly Higher
-  Significantly Lower

Objectives:

- Track public attitudes about Canadian food, agriculture, and food system issues with comparison to previous waves of research
- Measure trust among food system stakeholders
- Understand food issues Canadians are interested in, and where they are turning to for information on these topics
- Build a better understanding of emerging issues that will increasingly impact the food system (i.e. COVID-19, sustainability, food waste, etc.)

2. Public Trust Performance Metric Survey

In 2019 the Public Trust Steering Committee (PTSC) endorsed a proposal from CCFI to assume the work of the PTSC to advance public trust in Canadian food. As part of this work, CCFI has used the evaluation tool developed by Groupe AGÉCO to determine if, and to what extent, the activities undertaken by Canada's food system (both individual and overall industry) efforts are effective.

CCFI conducted research within the food sector to better understand and measure the outcomes of public trust efforts. A total of 39 responses were collected between September 9th - 30th, 2020. E-mail invitations were sent to amplifiers, industry, and government stakeholders. This survey will be conducted annually to track the progress on public trust efforts within Canada's food system. Some key findings from this study are included in this report, and a full report with analysis of all results will follow in a separate publication.

Objectives:

- Determine whether public trust is moving forward, as well as why and where progress is occurring
- Establish how well organizations—both individually and as a system—perform in relation to building public trust
- Report performance in a clear and consistent manner and share results widely

3. External Public Trust Research and the Public Trust Research Inventory

In fulfillment of its coordinating role to help the food system earn trust through research, additional public trust research is highlighted in this report.

Further public trust research can be found on the CCFI website in the [Public Trust Research Inventory](#). The inventory is an evergreen library of publicly available research related to public trust in agriculture and food as well as public trust more generally. CCFI is always looking to add to this resource and welcomes any submissions to be included.

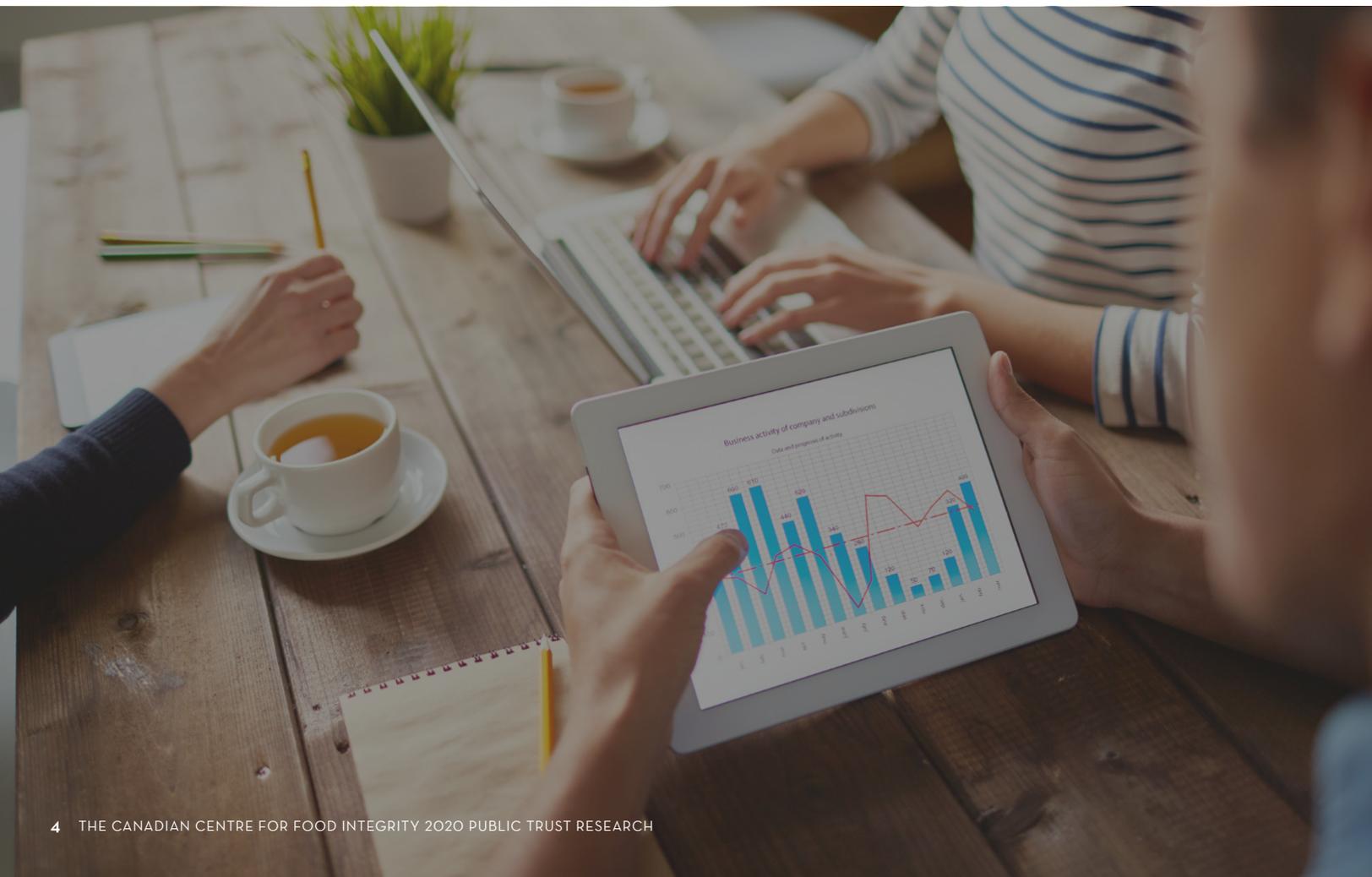
The information in this report is a summary of the 2020 research, which is meant to be broadly shared.

CCFI members have access to the full comprehensive results and customized insights. Please contact CCFI directly to find out more information relating to the 2020 results.

CCFI's research is designed to help all those involved in Canada's food system earn public trust. We encourage your input and feedback for future ideas relating to our research in pursuit of this essential, collective goal.



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





WHAT WE LEARNED





EXECUTIVE SUMMARY

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 graphics, tweet the statistics and use this information as a resource for your organization and as a tool to help others in your network.

Confidence in Canada's Food System at an All-Time High

This past year our food system has faced exceptional pressures and public scrutiny, but our sector has remained strong resulting in Canadians feeling optimistic about their food supply. **The proportion of Canadians who feel our food system is headed in the right direction has reached a five-year high;** after a significant 12-point increase compared to last year, a majority (47%) feel confident about the overall direction of our sector. More specifically, **the food system's response to the COVID-19 pandemic is highly praised by Canadians; nearly nine in ten (87%) trust that the food system will ensure the availability of healthy food for Canadians.**



Despite vocal critics and a global pandemic, **Canadians are confident in and optimistic about the food they eat and those who produce it.** Canada's food system stakeholders should be very proud of their efforts to ensure Canadians have uninterrupted access to healthy food.

Affordability is Front of Mind

A reflection of the unprecedented times we are living in, Canadians are more worried about many fiscal-related issues than they were last year- **topics such as the economy, the federal deficit, and unemployment have seen significant jumps in level of concern. For the past five years, Canadians are most concerned about the cost of food.** Canadians are facing economic strain on several fronts including food affordability; **about half say they are more concerned about food affordability compared to last year (45%).** Although cost of food is consistently a top of mind issue, the COVID-19 pandemic has highlighted this struggle with most Canadians indicating they have less money to spend on food due to the pandemic (51%).



Access to healthy, affordable food is a critical issue for Canadians. Answer this concern by continuously highlighting what you are doing to address food affordability - it is essential in building public trust among Canadians.

Sustainability – More Than Just a Buzzword

Like public trust, the topic of sustainability intersects the entire food system – but what do Canadians expect when addressing this issue? Overall, sustainability is most associated with food options and production practices that address climate change and have a positive impact on the environment. Canadians desire concrete actions to ensure a sustainable food system, not just lip service on the issue. **Consumers are demonstrating that sustainability in food is increasingly non-negotiable: a majority say they actively seek out food items that use less packaging (55%) or have a minimal environmental impact (47%).** Demand for environmentally friendly food options will only continue to grow. Younger Canadians (aged 18-23) are more likely to seek out these items and as their purchasing power increases with age, so too will the demand for these options.



Sustainability in food is not just a trend but a requirement to be a trusted and successful food system player. Address consumer concerns on this important issue by clearly demonstrating your commitment to environmental sustainability in food and agriculture as well as improving food packaging. When it comes to sustainability, do not get left behind! Those who are the most innovative will be the most successful.

What Gets Measured Gets Managed

Public trust in Canada's food system is hard to earn but easily eroded, and fostering trust requires collaboration across the entire value chain. CCFI's Public Trust Performance Metric survey is a **new** tool that will benefit the entire food system through cataloguing and tracking the progress on public trust efforts within Canada's food system. This research has confirmed that **public trust is a priority; one important gap, however, has been identified: only half (50%) of Canada's food system players any formal mechanisms to assess the effectiveness of current public trust activities.** Improvement is required in standardized and consistent measurement of the agri-food industry's public trust efforts.



Stay tuned for the full release of CCFI's Public Trust Performance Metric survey results. Reach out to ensure your organization is included in the survey next year to increase the robustness of results.





KEY ISSUES WITHIN
CANADA'S FOOD SYSTEM



ARE WE HEADED IN THE RIGHT DIRECTION?

Canadians are optimistic when it comes to Canada's food system. The perception that our food system is headed in the right direction has reached an all-time high; after a significant 12-point improvement compared to last year, half (47%) feel things are on the right track. There has been a corresponding significant decrease in the proportion of those who think the country's food system is on the wrong track (-7) and those who don't know (-6).

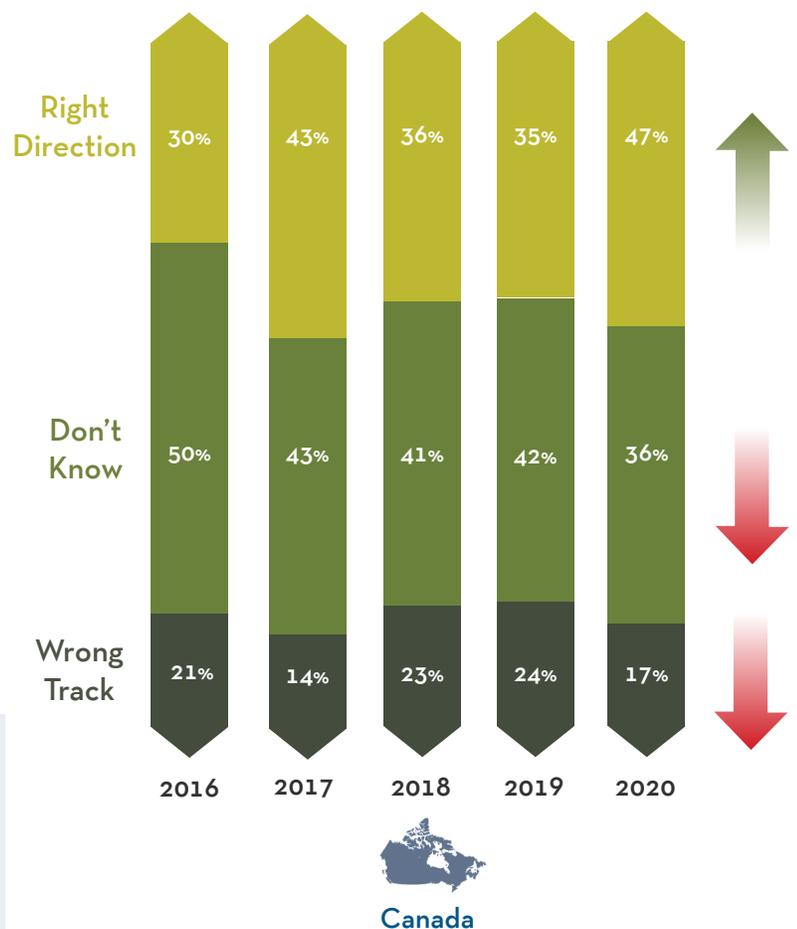


Build on this momentum through key groups

- Focus efforts on those who don't know.** Women are more likely than men to say that they don't know which direction Canada's food system is headed and represent the 'soft middle' of public opinion who are likely more open to an improvement of opinion.
- Know your detractors.** Canadians under 55 years old are more likely to feel things are headed in the wrong direction. Understanding and addressing concerns and attitudes among this group will help with long-term improvements in public trust.



The big picture matters. Significant improvements in the responses for this key metric is an important validation of Canada's food system and its stakeholders. Although some other more-nuanced public trust metrics have remained consistent, the overall increase in positivity towards our food system is a good news story.



*Question wording was changed this year from: "In general, do you think the food system in this country is moving in the right direction, or is off on the wrong track?" in 2019 to "Overall, would you say that the food system in Canada, including how food is grown, produced, and sold, is moving in the right direction or the wrong direction?"

LIFE CONCERNS

TOP FIVE ISSUES



Cost of food



The Canadian economy



Keeping healthy food affordable



The safety of food imported from outside of Canada



The federal deficit

Despite many other important issues gaining prominence over the past year, **the cost of food remains the issue Canadians are most concerned about**, demonstrating that food is one of the most basic needs before anything else. Just under six in ten say they are very concerned about the cost of food and the Canadian economy (56% and 55% respectively). Keeping healthy food affordable, safety of imported food and the federal deficit round out the top-five with half of Canadians reporting to be very concerned about these life issues. Overall, concerns about the economy and the federal deficit have softened concerns for price of food and its safety.

OTHER FARM AND FOOD ISSUES

45%



Food safety

41%



Food loss and waste in Canada

40%



Nutritious value of food

39%



Humane treatment of farm animals

37%



Environmental sustainability in farming

37%



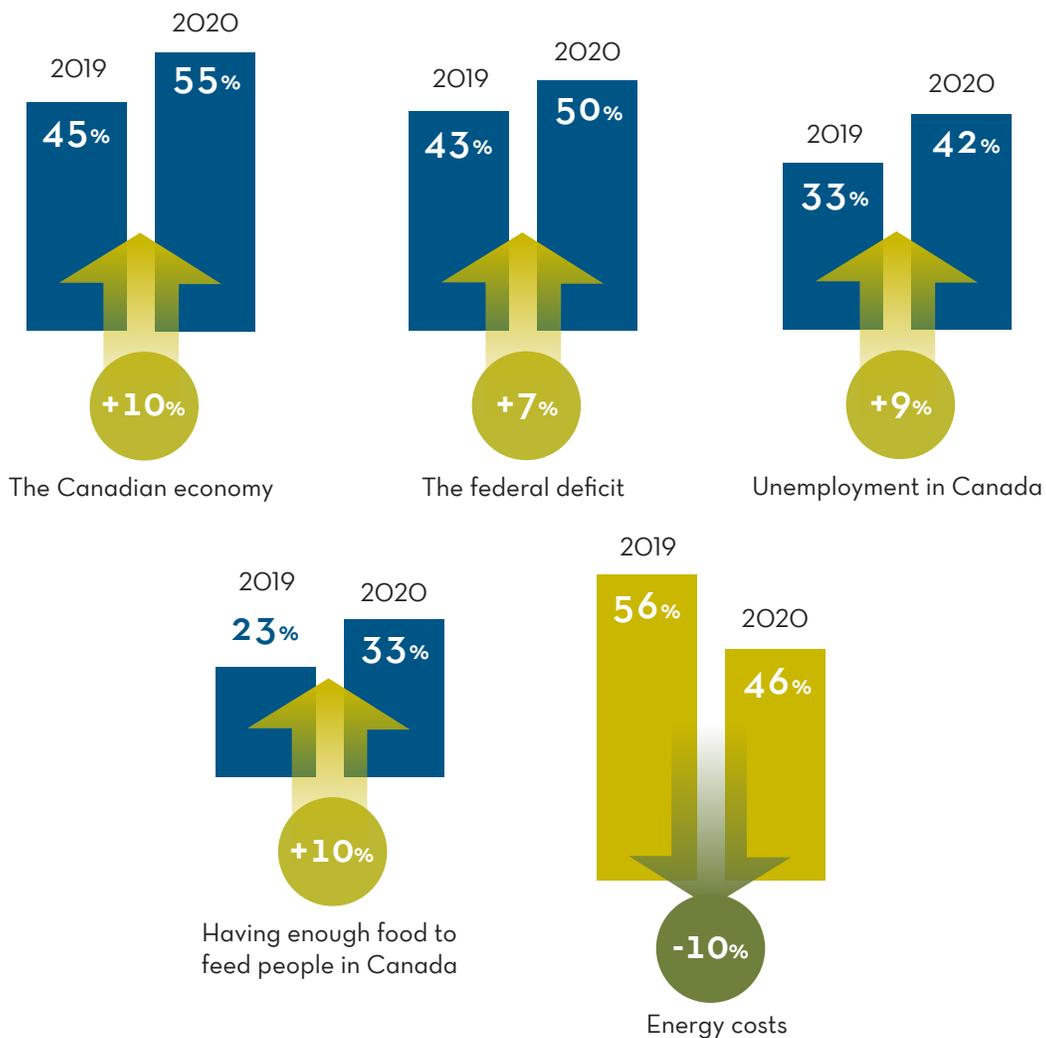
The availability of quality food for you and your family

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

CHANGES IN CONCERN VS LAST YEAR

CCFI's tracking data offers the ability to measure both long and short-term shifts in public opinion. CCFI is able to use its past data to empirically **observe** these shifts **rather than ask**, minimizing respondent regency bias.

CONCERN HAS SIGNIFICANTLY CHANGED IN:



SPOTLIGHT ON COVID-19

Despite the huge impact of COVID-19 on Canadians' everyday lives, confidence in our country's food system is extremely high; a majority (87%) agree that the country's food supply chain will keep fresh food available for all Canadians, a proportion which includes a quarter (24%) who say they 'strongly agree'. However, Canadians are still vigilant about their food during the pandemic. Six in ten (61%) say they are worried about the safety of food in restaurants and half (52%) say they are concerned about the safety of the food in grocery stores. A reflection of the difficult financial times facing many, half (51%) say they have less money available to spend on food today than before the pandemic.



I am confident that Canada's food supply chain will keep fresh foods, including meat, dairy and produce available for all Canadians



I am concerned about the safety of the food that I can purchase at restaurants as a result of the COVID-19 pandemic



I am concerned about the safety of the food that I can purchase at grocery stores as a result of the COVID-19 pandemic



I have less money available to spend on food today, compared to before the COVID-19 pandemic

■ Strongly Agree ■ Somewhat Agree ■ Somewhat Disagree ■ Strongly Disagree



Confidence in Canada's food system is high, but cost concerns persist. COVID-19 has put enormous pressure on the food and agriculture industry, and Canadians feel that our food system has successfully weathered this storm. Despite this positivity, **the pandemic has highlighted the importance of food costs - an issue Canadians have consistently cited as a top concern.** Food system stakeholders must continue to work to demonstrate their efforts to provide healthy, affordable food.

PUBLIC TRUST AT A GLANCE

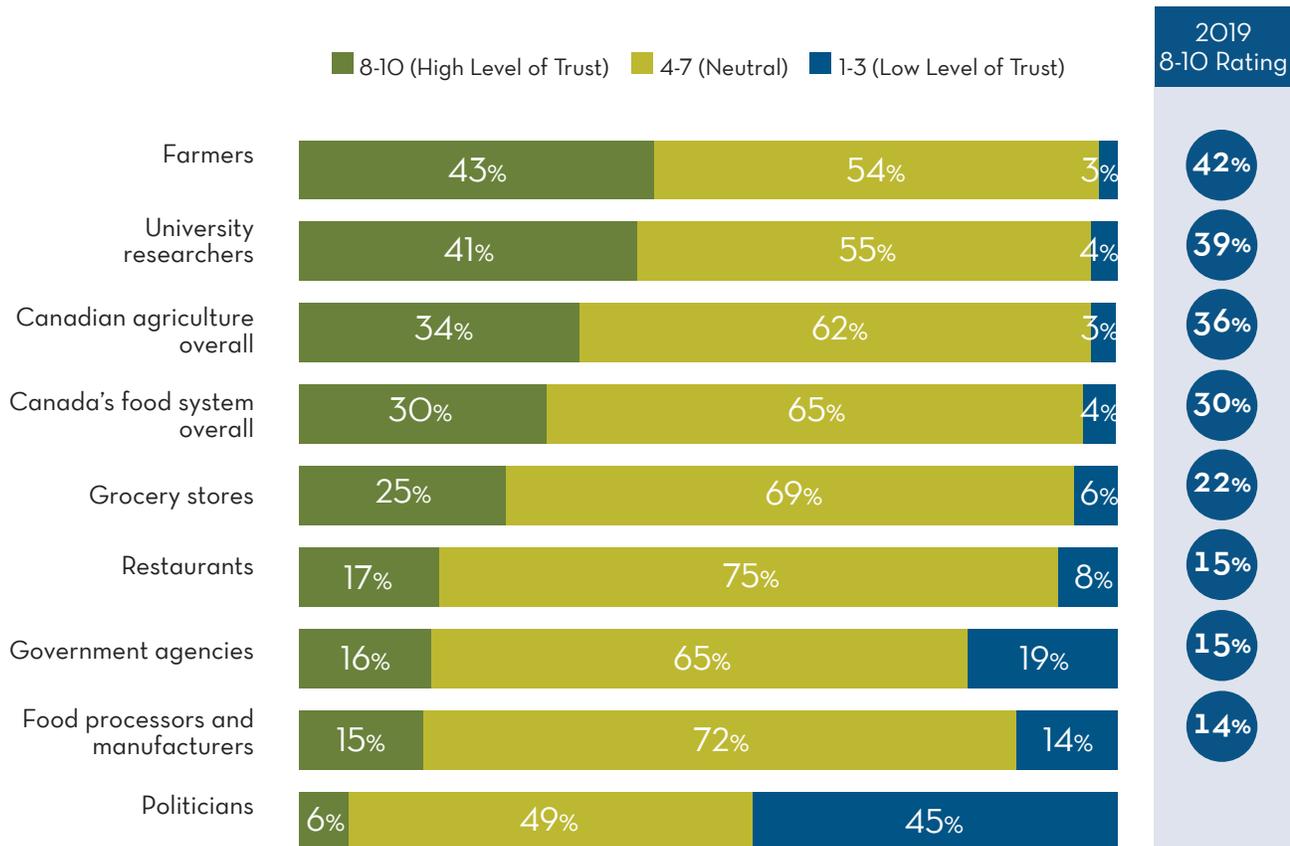
We asked Canadians to rate their level of trust towards a variety of food system stakeholders on several topics. **Across all areas, Canadians have the most trust in farmers.**

	Overall	Providing Information About Food	Food Safety
Farmers	1	1	1
Scientific/Academic Researchers	2	1	N/A
Grocery Stores	3	2	3
Restaurants	4	3	6
Federal Government Agencies	4	3	2
Food Processors and Food Manufacturers	5	4	7
Politicians	6	6	N/A
Advocacy groups	N/A	5	N/A
Food industry associations	N/A	N/A	5
Organizations that certify if products are organic	N/A	N/A	4

WHO DO CANADIANS TRUST WHEN IT COMES TO...

Overall Trust

Public trust ratings have remained consistent compared to last year. Nearly all Canadians say they have a high/neutral level of trust towards most food system stakeholders. On average, Canadians trust Canadian agriculture and the food system overall equally.

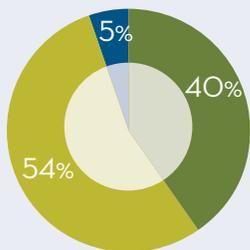


Providing Information

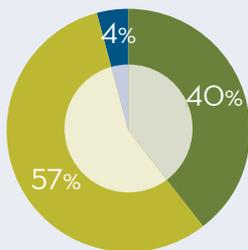
8-10 (High Trust) 4-7 (Neutral) 0-3 (Low Trust)



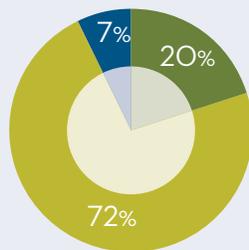
When it comes to providing information about food, consumers trust....



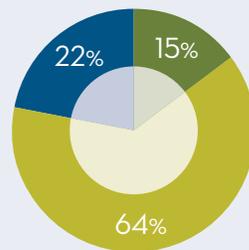
Scientific/Academic Researchers



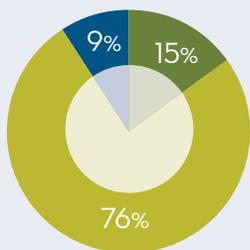
Farmers



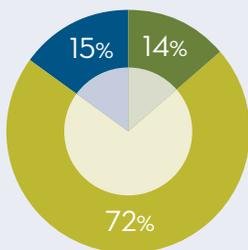
Grocery Stores



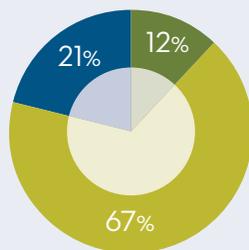
Government Agencies



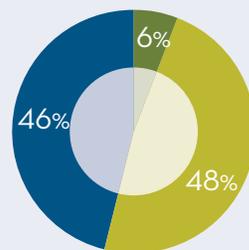
Restaurants



Food Processors and manufacturers



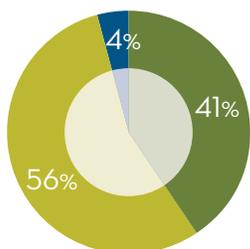
Advocacy Groups



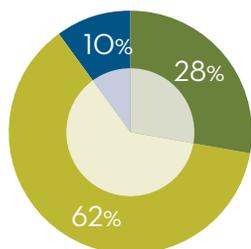
Politicians

Food Safety

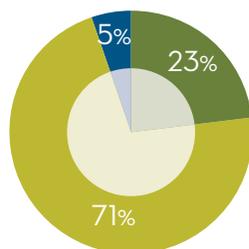
When it comes to food safety in Canada, Canadian consumers trust....



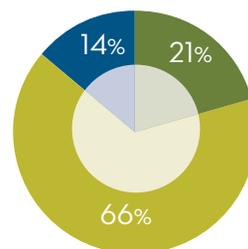
Farmers



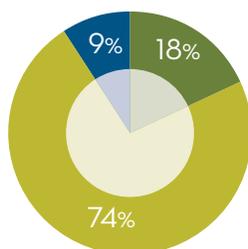
Federal government food inspection agencies



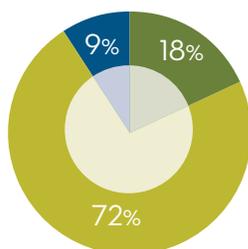
Grocery Stores



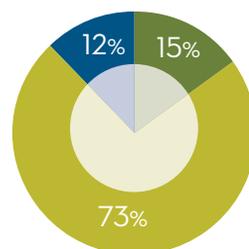
Organizations that certify if products are organic



Restaurants



Food industry associations



Food Processors and manufacturers



Collaboration is key! Work with trusted food system groups to convey your messages to Canadians.

WHAT ISSUES ARE CANADIANS ENGAGED WITH?

Within the past two years, most (65%) Canadians say they have sought information about nutrition & healthy eating, while four in ten (42%) have sought information about food safety. Other topics that Canadians have sought information about include environmentally friendly and sustainable food production (36%), plant-based meat alternatives (36%), and information about the humane treatment of animals (33%).

Information Sought About Food Related Topics in Past 2 Years



Nutrition and healthy eating



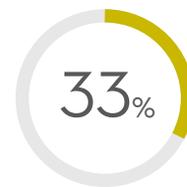
Food safety



Environmentally friendly or sustainable food production



Plant-based, meat alternative types of foods



The humane treatment of animals raised for food

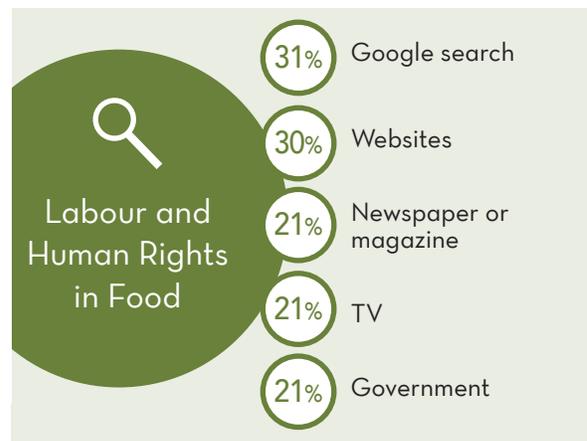
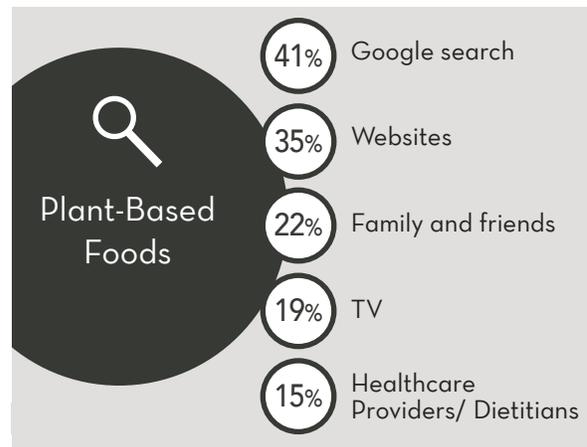
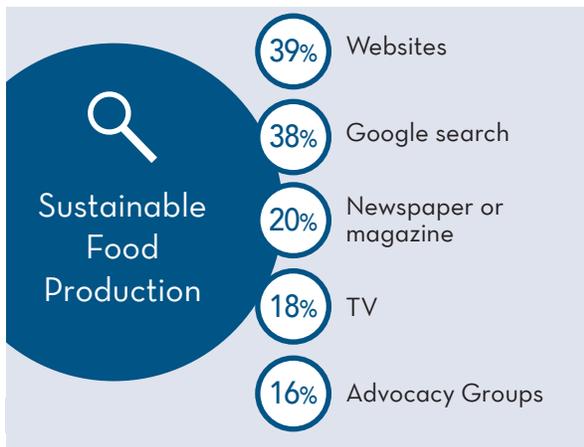
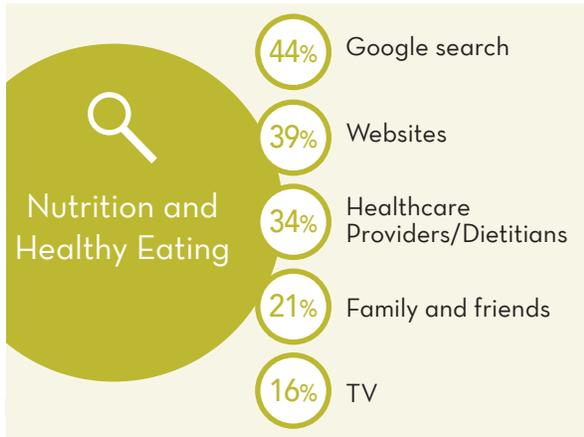


Labour and human rights in food production



WHERE ARE CANADIANS GETTING THEIR INFORMATION?

Across all issues, **Google and websites in general are the most frequently cited as the primary source of information.** Sharing this information with communications and marketing teams can be helpful when developing issue-specific content and delivery. *Top five mentions shown

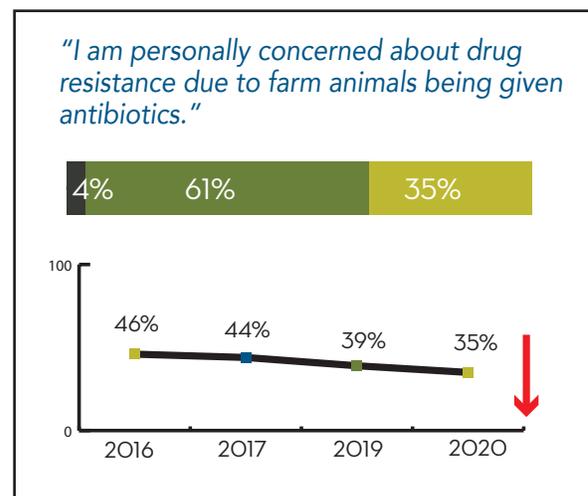
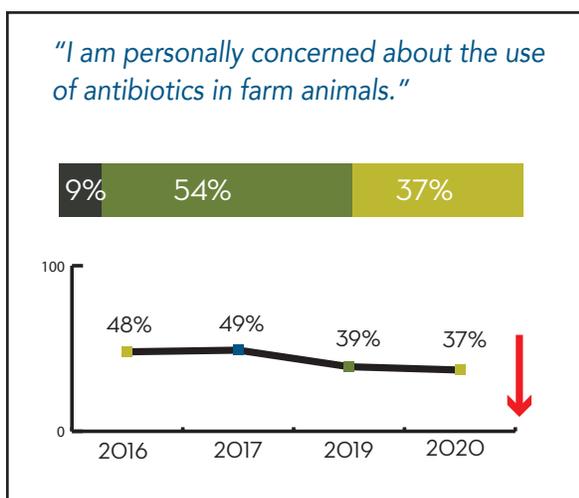


 **Go where people are looking!** Make sure to break out of any information echo-chambers you may be in. For example Twitter is not a highly cited source of information. Search engine optimization is key to making sure your message is reaching its intended audience.

PUBLIC ATTITUDE TRACKING OVER TIME

Spotlight on: Antibiotics

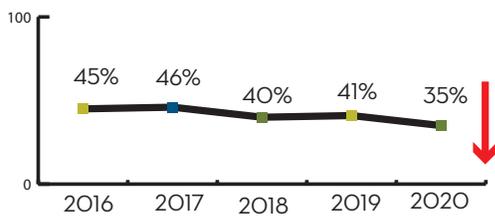
After years of consistency, **there have been several significant shifts in attitudes when it comes to antibiotics and our food system.** Concern about drug resistance due to farm animals being given antibiotics and drug residues in meat, milk, and eggs have reached a five-year low with just over a third saying they are very concerned about these issues. There was a significant decrease in the proportion of Canadians who feel that farm animals should be given antibiotics if they are sick (33%, down from 36% in 2019); this perception may reflect a lack of awareness around the scientific and animal welfare justification for this practice. The significant decreases in public opinion regarding specific antibiotic issues has not yet impacted overall concern about the use of antibiotics in farm animals which remains comparable to last year, but down 11 points compared to 2016 (37% are 'very concerned').



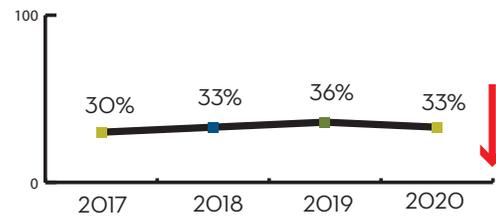
← LEVEL OF AGREEMENT →



"I am personally concerned about drug residues in meat, milk, and eggs."



"I believe farm animals should be given antibiotics if they are sick."



SUSTAINABILITY AND THE ENVIRONMENT

The issue of sustainability is gaining traction in all areas of life - from the clothes Canadian's wear, to the toys they buy their children and the food they eat. Sustainability is more than just a trend, but an issue that will increasingly influence consumer attitudes and behaviours. In order to meet expectations when it comes to sustainability in food, CCFI asked Canadians what it means to them when food is grown sustainably.

'Sustainable food' means different things to different people, but there are certainly commonalities across definitions. **Almost half (45%) believe sustainable food has a positive impact on the environment** and three in ten (31%) say that sustainable food means that it is grown/raised locally. Roughly a quarter to one in five Canadians say that 'sustainable food' means that food is safe for themselves and their family (25%), provides a healthy standard of living for farmers (22%), and is nutritious for themselves and their family (20%).

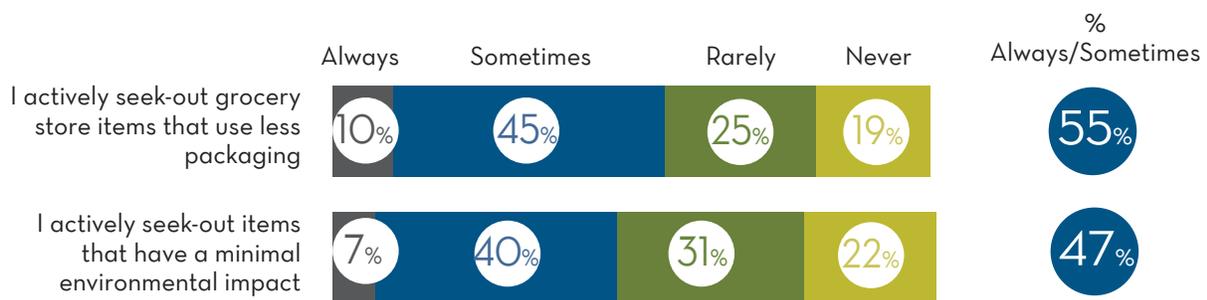
SUSTAINABLE FOOD...



SEEKING SUSTAINABILITY



Canadians are demonstrating a desire for their version of a sustainable food system through their purchasing power. Sustainable food is most commonly associated with a positive impact on climate change and the environment; this belief is put into action among a majority of Canadians who say they actively seek out grocery store items that use less packaging (55%) or have a minimal environmental impact (47%).



GEN-Z: Driving Demand for Sustainable Packaging...

Younger Canadians (aged 18-23) are the driving force behind consumer demand for environmentally sustainable food. **Compared to other Canadians, Gen-Z is significantly more likely to:**

- Define sustainable food as food that is available in sustainable packaging
- Seek out food items with less packaging (62%) and that have a minimal environmental impact (58%)

...and Plant-Based Food Products

Compared to Canadians aged 24+, younger Canadians are significantly more likely to say they actively seek out grocery stores, restaurants, and recipes that offer plant-based or meat alternative options.

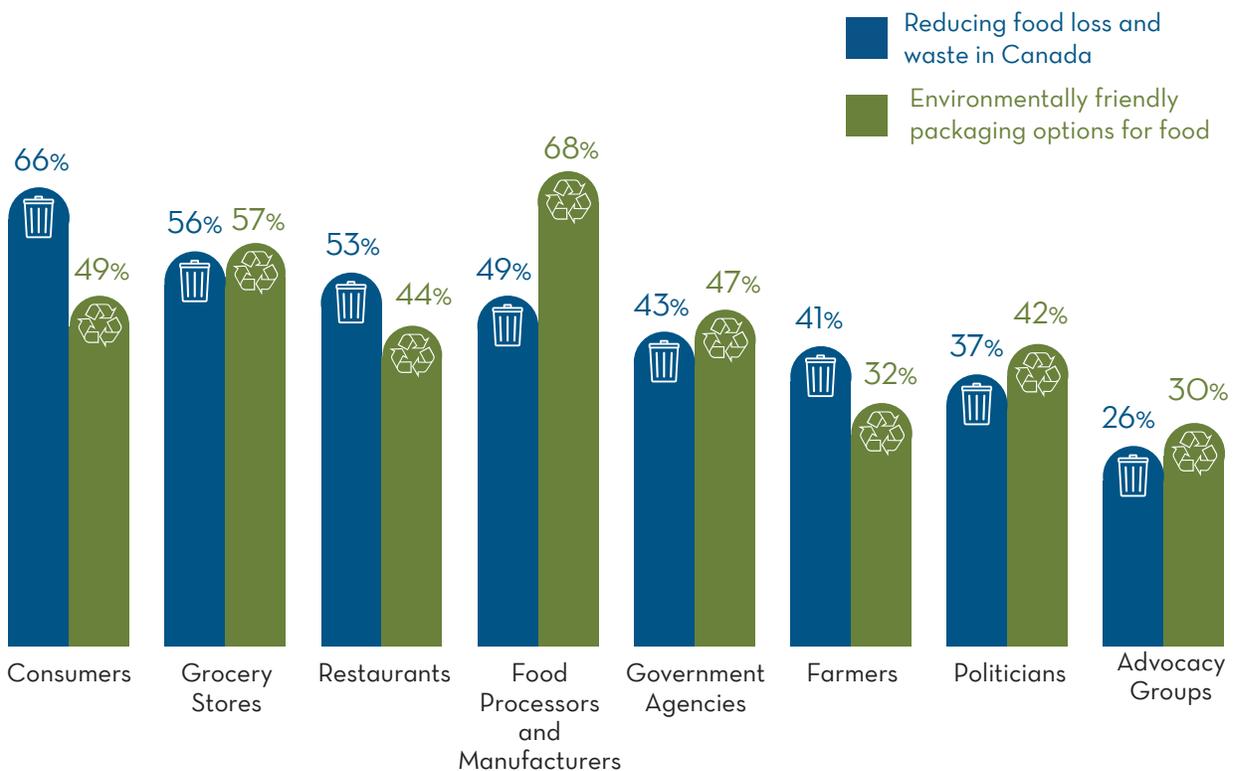


Demand for plant-based options will continue to grow. Our research shows that the proportion of household grocery shopping someone does increases with age, so the fact that younger Canadians are interested and are actively seeking out plant-based food options is a trend to watch and prepare for as this group's purchasing power increases.

WHO IS HELD RESPONSIBLE FOR...

Responsibility for reducing food waste is highest where Canadians can see it firsthand: themselves (66%), grocery stores (56%) and restaurants (53%). Although other sources account for a greater percentage of food waste within the food chain, **the food system can help empower consumers to reduce the amount of food wasted through innovative approaches** such as offering smaller, less expensive portions at restaurants or providing food storage tips at grocery stores.

Nearly seven in ten feel that food processors and manufacturers are responsible for reducing the amount of packaging and offering more environmentally friendly packaging options for food (68%). Many other stakeholders have a role to play on this issue as a majority feel grocery stores, consumers, government, and restaurants hold some responsibility to improve food packaging.

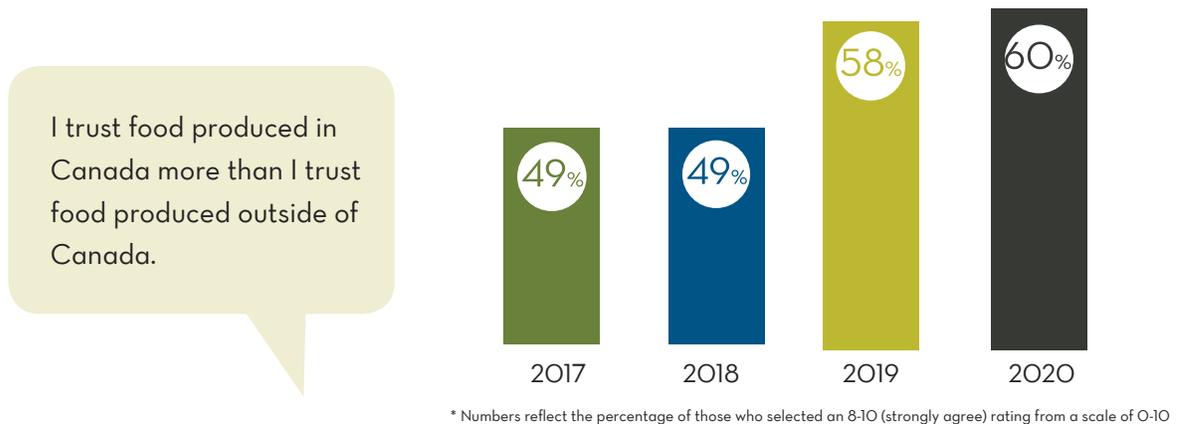


Addressing sustainability must centre on the environment. Although local, safety, and human rights are also associated with sustainable food – a positive impact on the environment is by far the most common association on this topic. Canadians themselves are seeking out food with a positive impact on the environment – food system stakeholders who offer these types of products will be addressing consumer concerns and rewarded with increased sales.

FOOD SAFETY AND REGULATION

Trust in Canadian food reaches a tracking high...

Despite increased pressure and attention on our food system, the safety of food is not a top of mind concern - **Canadians are secure in the fact that the food they eat is safe.** Overall concern for food safety has decreased compared to last year.



...While trust in food inspection system remains steady

Concern about the safety of imported food has remained stable for the past five years and has not been impacted by COVID-19 (51% very concerned, unchanged from 2019).



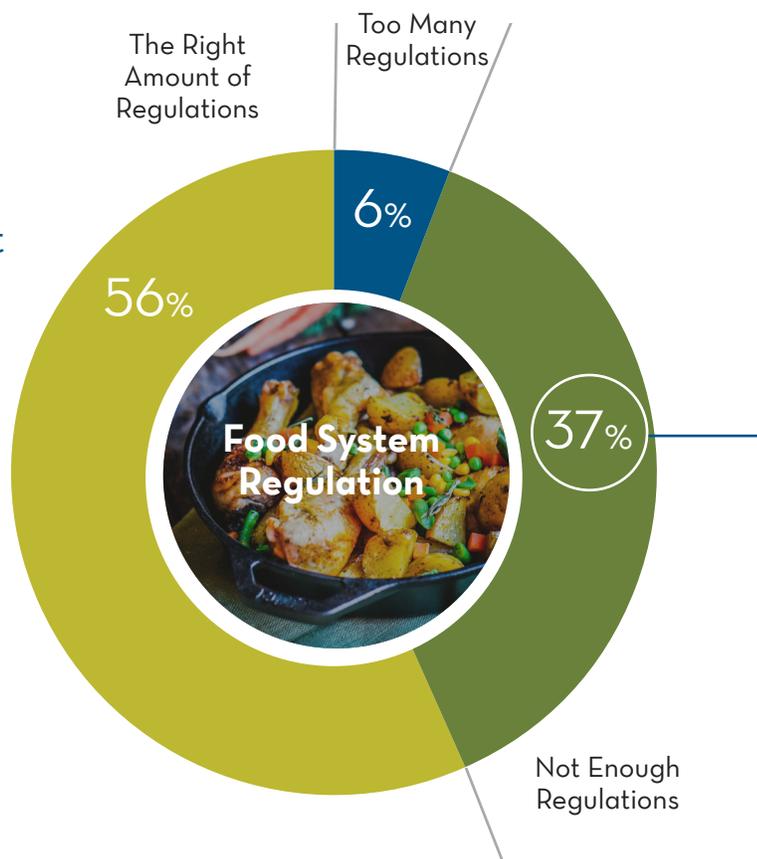
Furthermore, nearly all Canadians agree or feel neutrally (95%) about the fact that **our federal government food inspection system ensures the safety of our food. The steadiness of this measure demonstrates an implicit trust in current government practices to ensure the safety of food.**

FOOD SYSTEM REGULATION

A Majority of Canadians Feel Canada's Food System has Right Amount of Regulations

Although most Canadians feel our food system is appropriately regulated, over a third indicate there are not enough regulations.

There is one area Canadians clearly feel requires increased regulations: pesticides and chemicals; other issues such as GMOs, limiting food waste, and environmental standards follow distantly.



In What Areas of Canada's Food System Would You Like to See More Regulation?



Show your work. Calls for increased regulation may reflect a lack of knowledge of what is already being done on issues Canadians care about like pesticides/chemicals, GMOs and food waste and environmental issues. Highlight the regulations and standards in place to build awareness and trust on these important food system topics.

AFFORDABILITY AND QUALITY

For the fifth year in a row, the cost of food is rated as the top concern among Canadians. Inherently linked to the issue of cost is affordability, and these issues have been further highlighted as a result of the COVID-19 pandemic.

Money Worries – Half of Canadians are More Concerned about Affordability Than They Were Last Year

When asked directly, a majority of Canadians agree that they have less money available to spend on food today compared to before the COVID-19 pandemic (51% strongly/somewhat agree). The reality of the financial strain Canadians are under is further borne out in CCFI's tracking data – a similar proportion (45%) say that they are more concerned about the affordability of healthy food than they were a year ago.

Beyond Cost – Tracking the Importance of Quality

All people deserve access to healthy, affordable, and quality food. CCFI has developed a baseline measure on this issue and found that **nearly four in ten (37%) are very concerned about “the availability of quality food for you and your family”.**

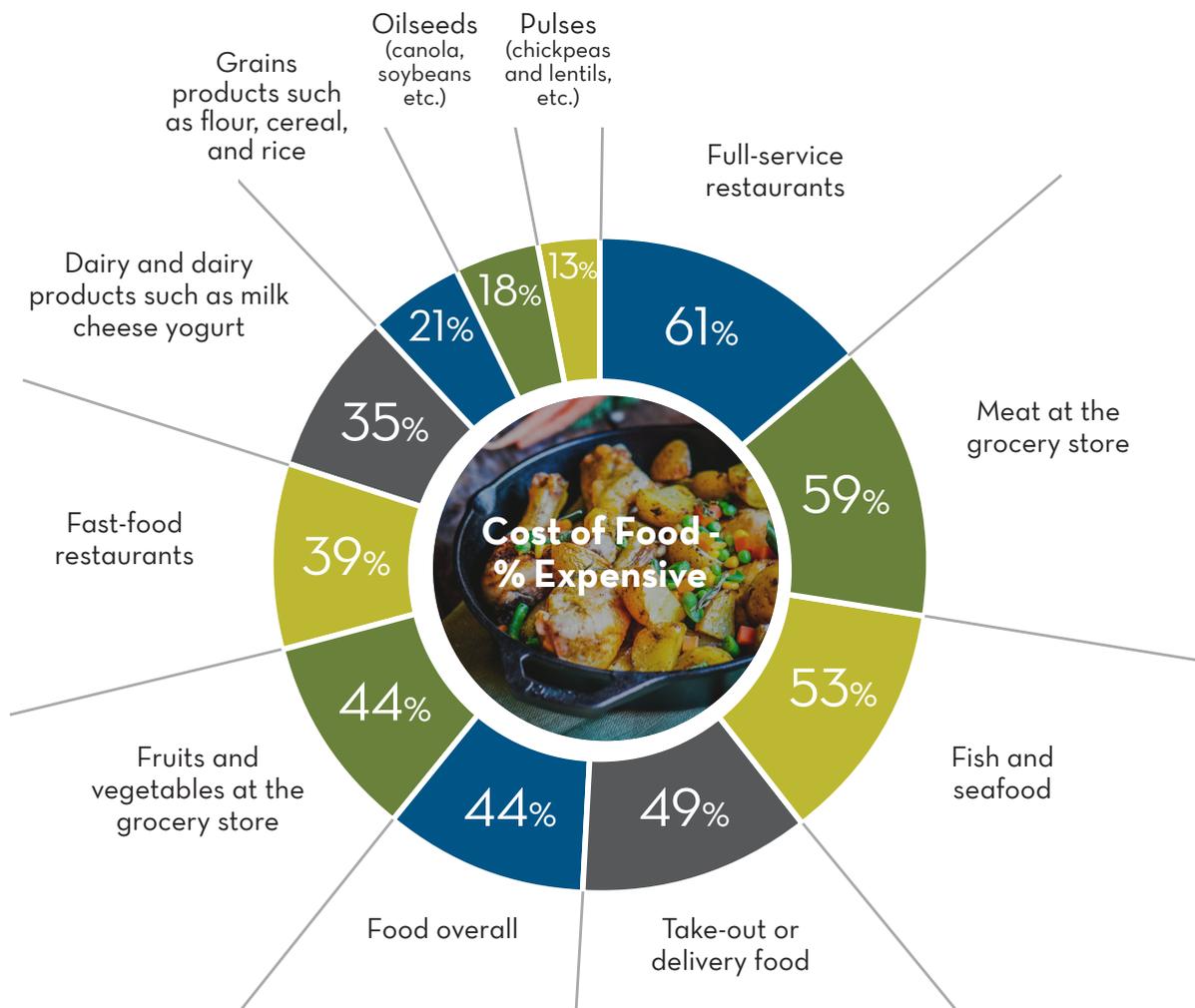
I am more concerned about the affordability of healthy food than I was a year ago.



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

Affordability Ratings

In an effort to further understand Canadians' concerns when it comes to food affordability, CCFI investigated perceptions of affordability by various types of food. Restaurants, meat, fish/seafood, and takeout are the areas that Canadians find to be the most expensive. The cost of food overall was rated mid-level, with just under half of Canadians indicating food overall to be expensive.



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



Addressing competing concerns may require trade-offs. Canadians and the food system alike must continue work to balance the sometimes-competing demand for affordable and high-quality nutritious food.



PUBLIC TRUST PERFORMANCE METRICS



This year, CCFI conducted research within the food sector to better understand and measure the outcomes of public trust efforts. The research results are a benchmark for the future and the study will be conducted annually moving forward. In this report, there are snapshots of the results with a full publication to come in 2021.



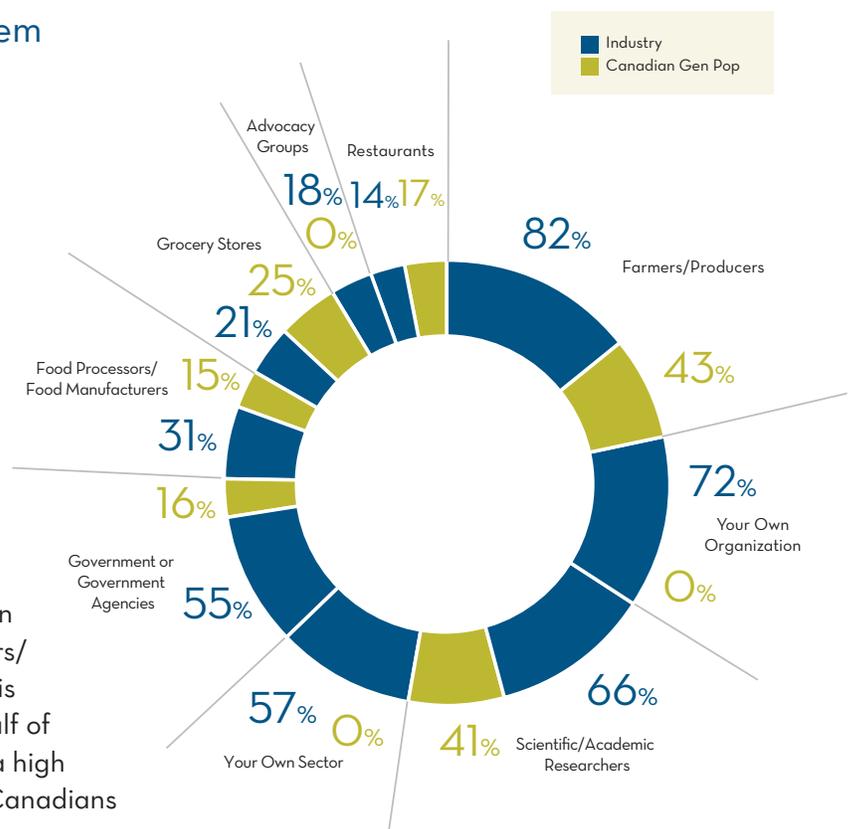
Public trust is not just a buzzword, but an important business risk that must be taken seriously to ensure success and longevity within food and agriculture. Many of Canada’s food system stakeholders recognize the importance of public trust and are taking action to maintain and build trust with Canadians.

As a coordinating body of public trust in Canada, the Canadian Centre for Food Integrity has collected baseline information on public trust efforts within the industry with the goal to consistently catalogue, track effectiveness and share results in order to benefit the entire food system. **Key metrics are shared in this report, with full results to be published in early 2021. Results from this annual study will serve as a base from which to compare future efforts.**

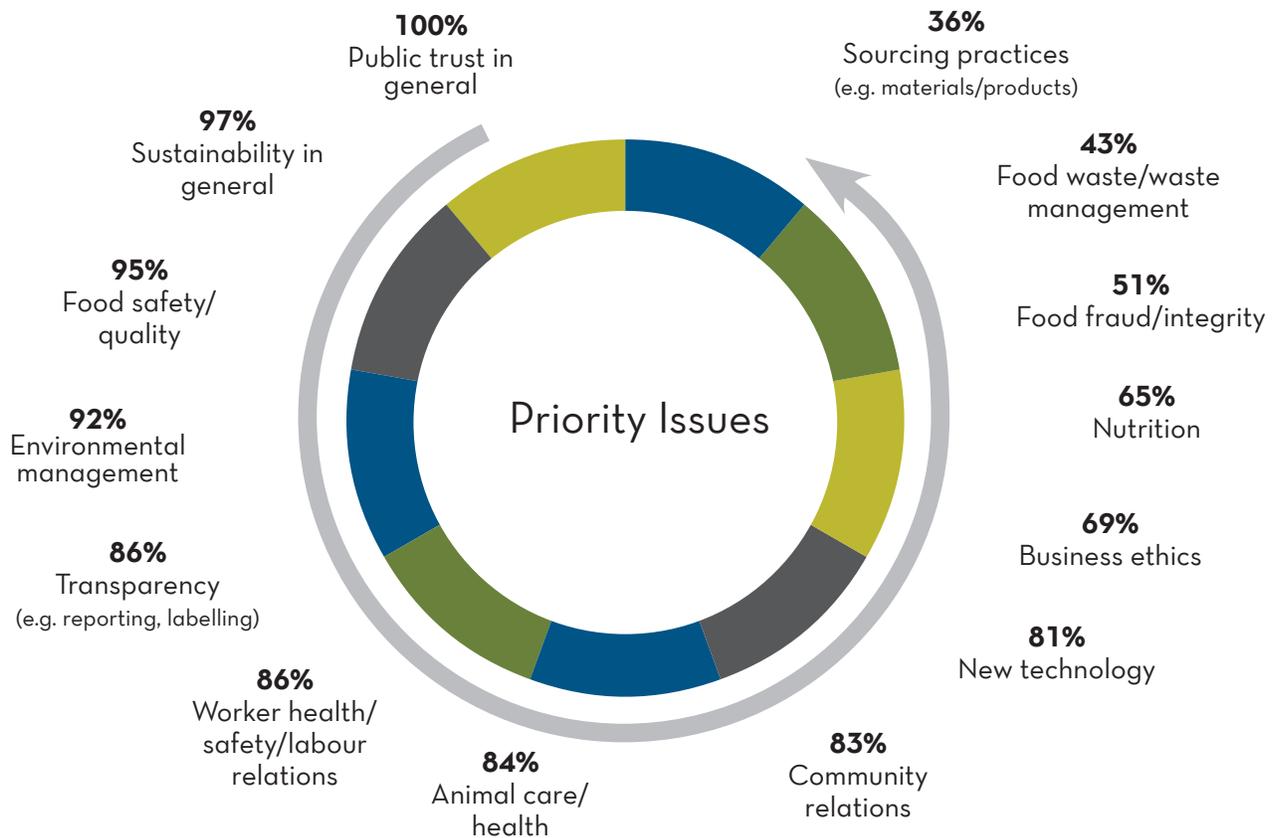
Trust in Canada’s Food System

Average Canadians and food system stakeholders agree - when it comes to trust in Canada’s food system - farmers/producers are at the top but commonalities between Canadians’ and industry opinion end there. **There are dramatic differences between trust ratings - a reminder that those within the food system have a unique perspective on public trust that does not necessarily reflect average Canadian beliefs and attitudes.**

Industry survey respondents are twice as likely to report a high level of trust in farmers/producers and food processors/manufacturers. A similar discrepancy is seen between trust in government - half of industry respondents (55%) provided a high trust rating compared to only 16% of Canadians overall.



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



* Numbers reflect the percentage of those who indicated area was of 'high/medium' priority for their organization

Public trust in general is the most identified 'high/medium' priority issue for one's organization. Sustainability, food safety/quality, transparency, worker health/safety/labour relations are secondary, but still highly ranked public trust issues. [CCFI's 2017 'Tackling Transparency and How it Builds Public Trust'](#) public trust research reveals that demonstrating transparency on these specific issues will lead to improved trust.

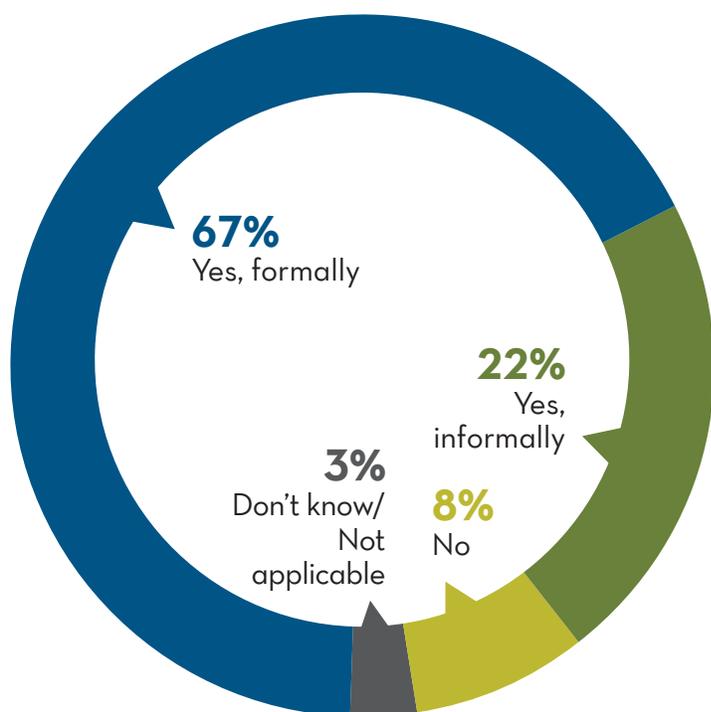
Public Trust as a Business Risk

Respondents not only say public trust is an important issue, but their actions support it. Nine in ten (89%) have assessed their public-trust related risks and opportunities regarding individual and/or industry activities (e.g. using a SWOT analysis, industry benchmarking or review of literature). Only one in five (22%) utilized a formal assessment while two-thirds (67%) have done so informally; **increased formalization of this type of analysis will help to better-support public trust efforts.**

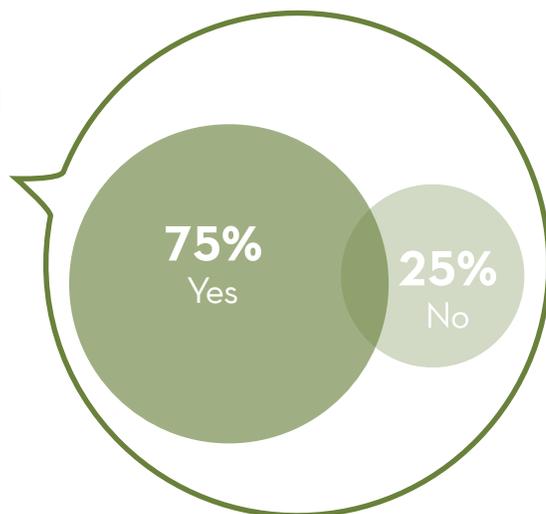
Achieving Public Trust

Although incidence of a designated person/group responsible for public trust is quite high (89%) - improvements can be made. This important role is only formally established among two-thirds (67%) of respondents. **Beyond discussing the issue of public trust within an organization, efforts must have a tangible impact which will require authority over an organizations' decision-making process.** Currently, industry reports that three-quarters (75%) of those responsible for public trust has authority over its organization's decision-making which is a respectable majority but can be improved.

Is there someone or a group in charge of public trust within your organization?



Any authority over the organizations' decision-making process?



Appetite for Coordination High

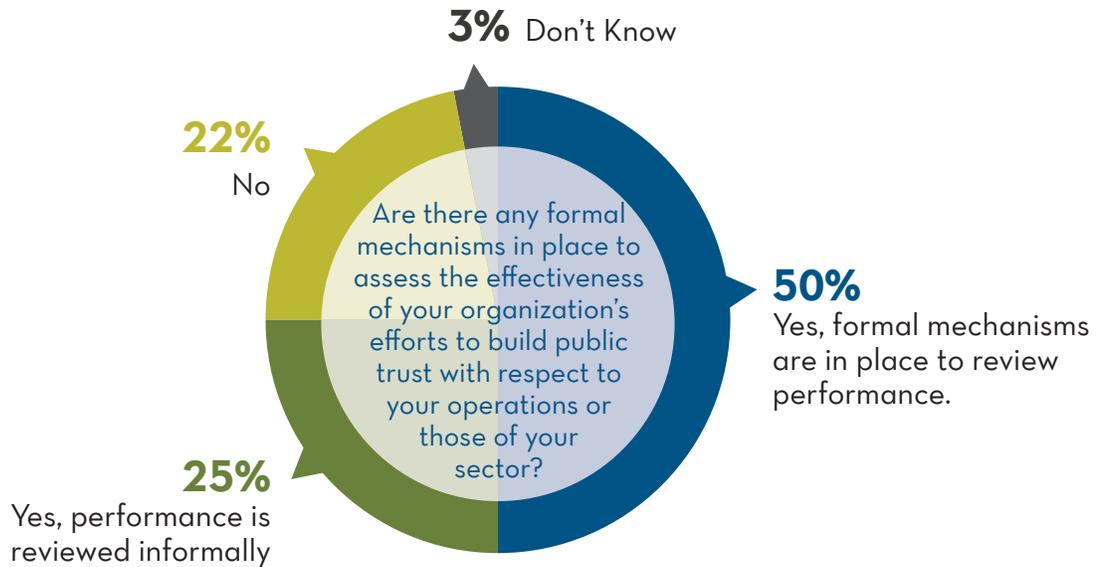
Respondents understand the importance of a coordinated approach in effectively achieving public trust. All respondents report seeking alignment with other public trust initiatives when developing and/or implementing public trust related tools.

78%
Yes, alignment is sought whenever possible and appropriate.

22%
Yes, but only occasionally.

Performance Metrics and Communications

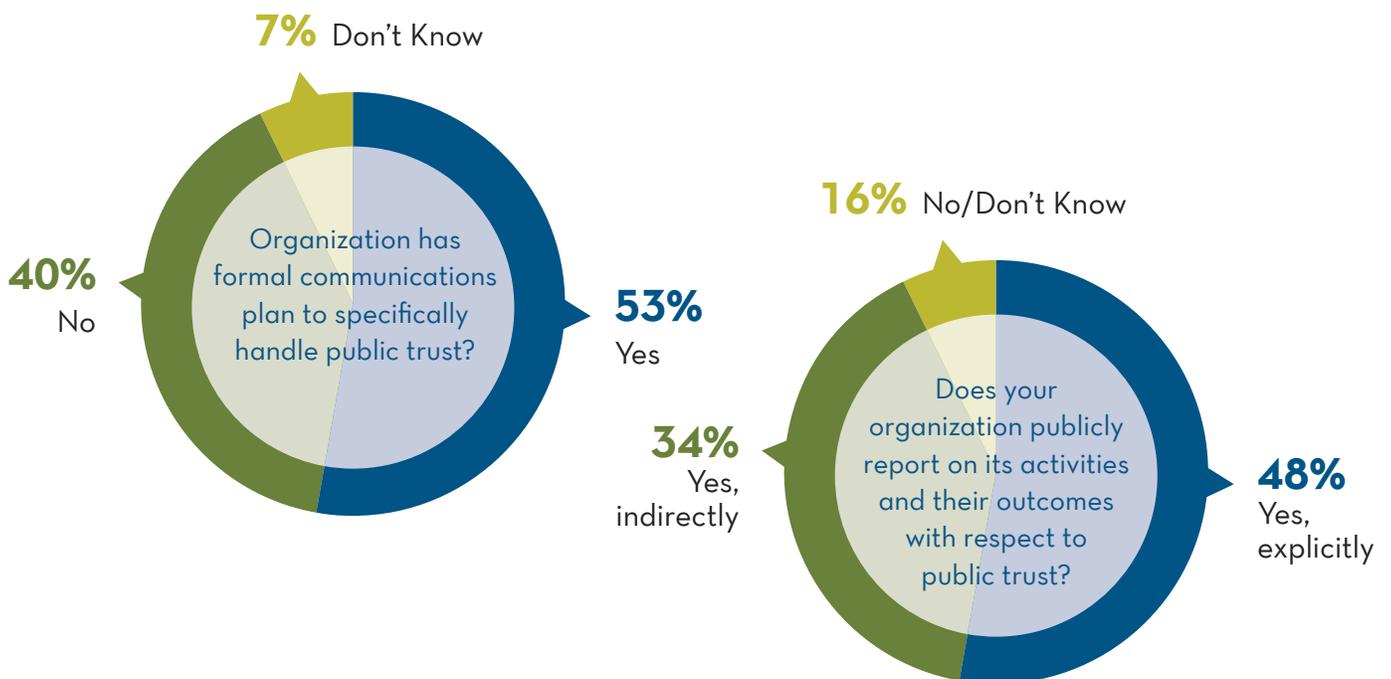
Only half of organizations have any formal mechanisms in place (e.g. data analytics, sector benchmarking, review panel, consultation) to assess the effectiveness of their efforts to build public trust.



A standardized and consistent method of tracking public trust efforts, like this study, is an important step in more effectively building public trust within the food and agriculture industry.

Reporting and communications of public trust activities should be more formal and explicit.

Transparent and clear communications of the efforts undertaken to address issues of public trust are key to demonstrating the industry's commitment to continuous improvement on important food system issues.





EXTERNAL PUBLIC TRUST RESEARCH



In order to fulfill CCFI's coordination role, we have expanded our Public Trust Research report to include external research. The following studies demonstrate that among stakeholders that conduct research on the topic of public trust, the results align. Collaboration throughout the food system is critical to effectively move the bar when connecting with Canadians.

We are thankful to the food system partners that shared their research in this report.

ADDITIONAL SOURCES OF PUBLIC TRUST RESEARCH

BC Agriculture Council 2020 Consumer Research

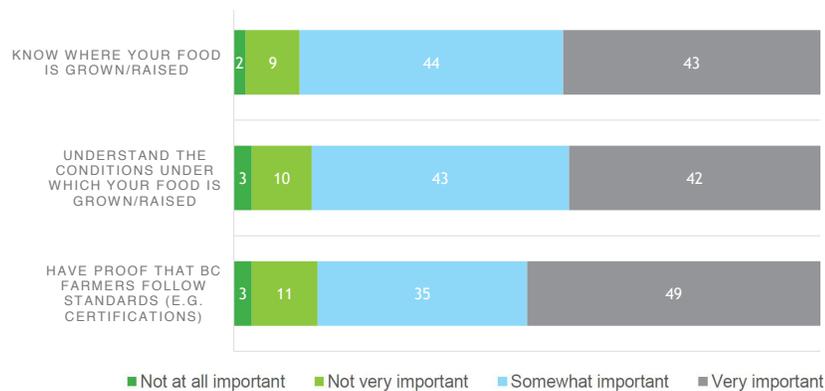


BC Agriculture Council (BCAC) is a non-profit, non-governmental “Council of Associations” representing nearly 30 farm associations that in turn generate 96% of provincial farm gate sales. Engaging more with consumers is a priority initiative for BCAC. They are leading an industry collaboration to bridge information gaps, understand and address concerns, and strengthen confidence between consumers and B.C.’s land and ocean-based producers. In 2020, BCAC completed research with a representative sample of 883 residents across the province of British Columbia.

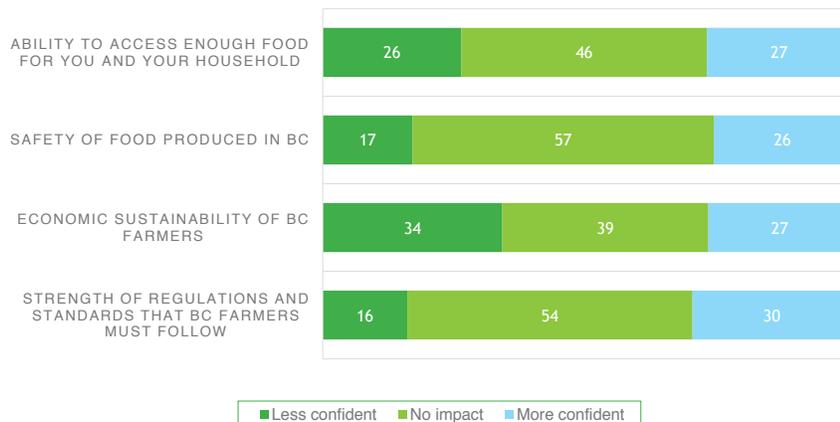
KEY Insights:

- When asked how important it is for B.C. residents to know where their food comes from, almost 90% said, “important”.
- 85% of respondents indicated that it is important that they understand the conditions where their food is grown or raised.
- Almost half of respondents think it is very important to have proof of production standards, such as certifications.
- Most B.C. residents are as confident or more confident in the safety of food produced in B.C. since the start of the COVID-19 pandemic.

Overall, how important is it for you to:



CONFIDENCE SINCE START OF COVID-19



Source: <https://bcac.ca/what-we-do/pt/resources/>

Edelman is a global communications firm that partners with businesses and organizations to evolve, promote and protect their brands and reputations. They conduct research annually that measures trust in different key areas among the public.

In 2020, they completed research across the globe with over 34,000 respondents in total, across 28 markets, with 1,150 respondent.

KEY Insights:

Overall trust in Canada is steady. Despite a 3-point decline vs 2019, we remain in 'neutral' trust category.

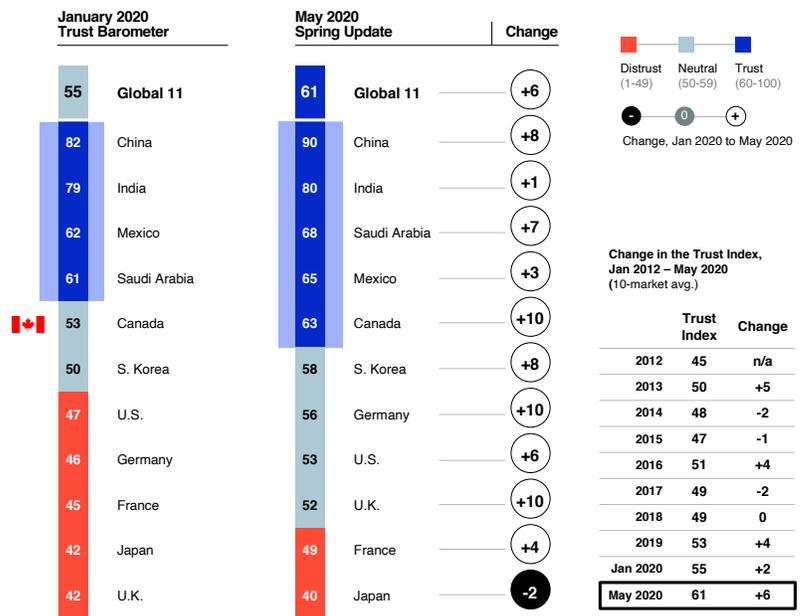
A RECORD RISE IN TRUST; TRUST INDEX AT ALL-TIME HIGH

Trust Index

11-market global average increases 6 pts., with increases in 10 of 11 markets

Distrusting markets decline from 5 to 2

2020 Edelman Trust Barometer Spring Update. The Trust Index is the average percent trust in NGOs, business, government and media. TRU_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right. 9-point scale, top 4 box, trust. General population, 11-mkt avg.



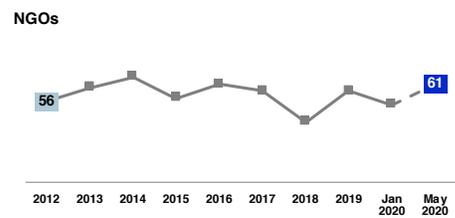
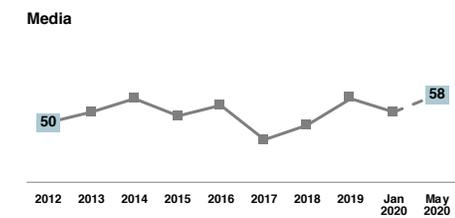
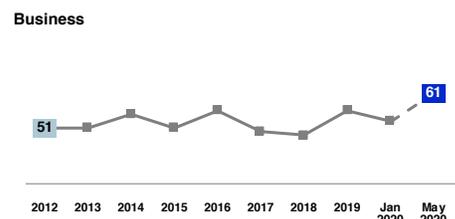
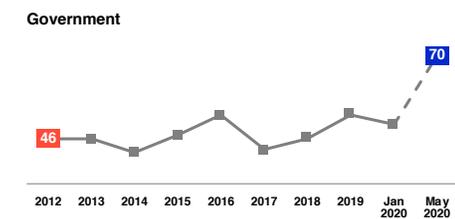
KEY Insights:

Overall, trust levels in the Spring update report reflect an all-time high with record results in the business, media and government sectors. The report reveals that Canadians turned to traditional media during the pandemic and the trust in these sources increased dramatically. Take note of where Canadians turn to for information in uncertain times.

RECORD HIGHS FOR GOVERNMENT, BUSINESS AND MEDIA

Distrust Neutral Trust

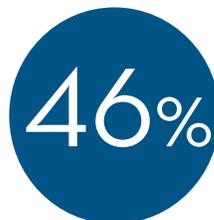
Per cent trust in Canada



2020 Edelman Trust Barometer Spring Update. TRU_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right. 9-point scale; top 4 box, trust. General population, Canada.



Worry about false information or fake news being used as a weapon.



Stated they are belief-driven buyers and will choose, switch, avoid and boycott brands based on its stand on societal issues.

Source: Edelman, <https://www.edelman.com/sites/g/files/aatuss191/files/2020-01/2020%20Edelman%20Trust%20Barometer%20Global%20Report.pdf>



The Saskatchewan Ministry of Agriculture conducts annual public opinion research to gain insight into public perceptions of agriculture and the agri-food industry, assess the impact of efforts to build public trust, and to establish benchmarks for future initiatives.

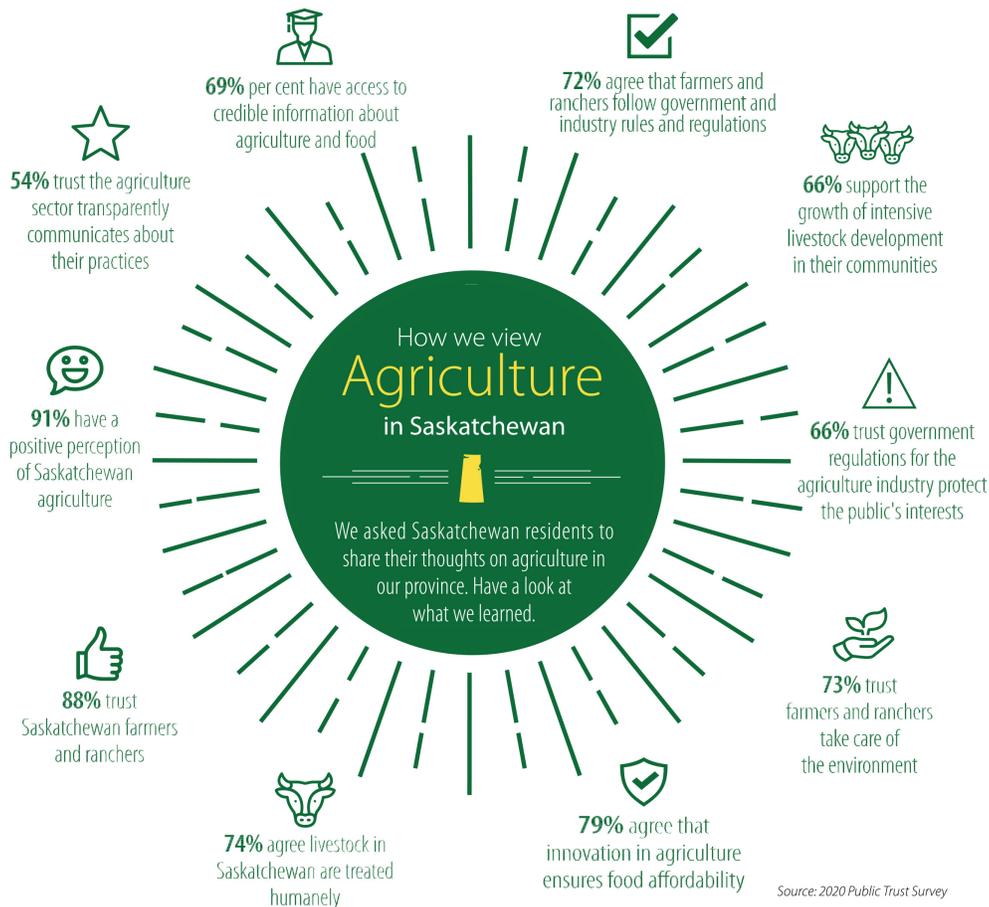
The 2020 survey asked 805 residents in Saskatchewan to comment on a total of ten statements.

KEY Insights:

Overall, 73% trust farmers and ranchers take care of the environment which is up from 2019.

79% agree that innovation in agriculture ensures food affordability.

Only 54% agree that the agriculture sector transparently communicates about their practices with 27% being unsure and 18% disagreeing.



The Nourish Marketing company produces an annual Trend Report that reveals cultural forces and shifts, not just fleeting fads. The 2020 Nourish Trend Report revealed 10 trends to watch for and adjust to moving forward.

KEY Insights:

Check out the top trends! These themes are developing among Canadian consumers and influencing their food choices, communication preferences and overall purchasing decisions. Dive into these insights to understand what Canadian shoppers are thinking and be sure to keep them in mind moving forward.

Unpackage me: Solutions Beyond Recycling

Sober Me: Rethinking Alcohol for a New Generation of Drinkers

Know Me: AI and Hyperpersonalizing Foodservice

Save Me: Environmental Impact-Based Eating

Science Me: Redefining “Real” Food in the High-Tech Era

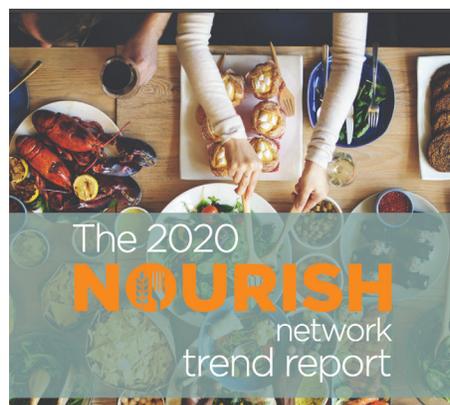
Entertain Me: Evolving Grocery Shopping from Chore to Experience

Keto Me: The Evolution of Lifestyle Eating From No-Carb to Slow-Carb

Nourish Me: Serving Local Food in Public Institutions

Near Me: Farming Gets Closer to the Consumers

Teach Me: Consumers Want to Know More About Modern Farming Practices



Source: Nourish Food Marketing, <https://www.nourish.marketing/download-your-free-copy-of-the-2020-nourish-network-trend-report-for-a-look-at-the-year-ahead/>

CONSUMER INSIGHTS ON CANADA'S FOOD SAFETY AND FOOD RISK ASSESSMENT SYSTEM



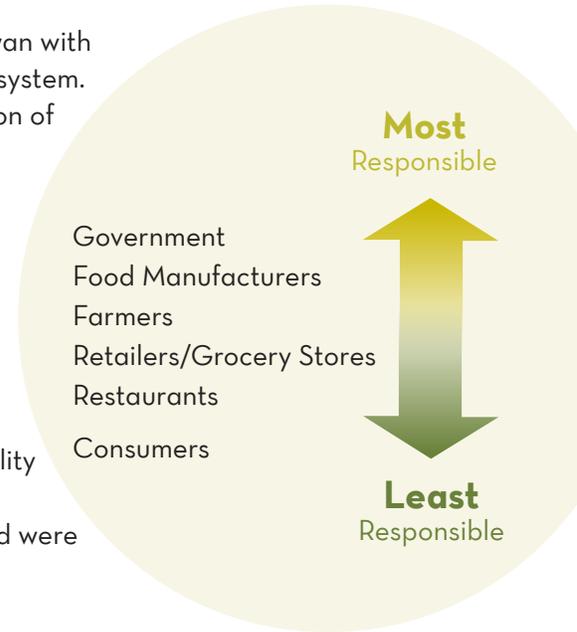
A research study was completed through the University of Saskatchewan with the goal of evaluating consumer perceptions of Canada's food safety system. Results revealed the areas of concern were about public communication of food risks and general transparency.

The research was conducted through an online survey with 500 respondents aged 25-75 that were representative of the provincial population; the sample focused on individuals that were of higher education and wealthier than the average Canadian.

KEY Insights:

Participants were asked who they feel should hold the most responsibility to monitor and ensure food safety. Government was rated as most responsible while respondents held themselves far less responsible and were rated last.

Source: Chelsea Sutherland, Cassidy Sim, Savannah Gleim & Stuart J. Smyth (2020): Consumer Insights on Canada's food safety and food risk assessment system. Journal of Agricultural & Food Research, <https://doi.org/10.1016/j.jafr.2020.100038>



CANADIAN CONSUMER INSIGHTS ON AGRICULTURE: Addressing the Knowledge-Gap

A study was conducted by a group of researchers out of the University of Saskatchewan to understand the knowledge-gap between food production and consumers. Overall, the study suggested that the agriculture industry focus on crop production, organic production, and advanced plant breeding technologies when communicating information.

The study was conducted across English-speaking Canada with a total of 700 participants who were weighted based on the province populations.

KEY Insights:

When asked if agricultural chemicals are more toxic today than 25 years ago ...



The 'under 25' age category was much more likely to feel that agriculture chemicals are more toxic today (41%)

Source: Chelsea Sutherland, Cassidy Sim, Savannah Gleim & Stuart J. Smyth (2020): Canadian Consumer Insights on Agriculture: Addressing the Knowledge-Gap, Journal of Agricultural & Food Information, DOI: 10.1080/10496505.2020.1724114

U.S. INDUSTRY RATINGS

GALLUP®



Gallup is a global analytics and advice firm that helps leaders and organizations solve their most pressing problems. The company completes annual tracking surveys of Americans' views on a variety of business and industry sectors.

The results are based on telephone interviews with 1031 adults, ages 18+ living in all 50 U.S. states and the District of Columbia.

KEY Insights:

For the first time in 20 years, Gallup's results reveal that farming and agriculture are on top when it comes to Americans' positive views. The grocery and restaurant sectors follow closely behind which reflects the importance of the entire food system.

Americans' Views of U.S. Business and Industry Sectors, 2020

For each of the following business sectors in the United States, please say whether your overall view of it is very positive, somewhat positive, neutral, somewhat negative or very negative.

	Total positive %	Neutral %	Total negative %	Net positive pct. pts.
Farming and agriculture	69	19	11	+58
Grocery industry	63	24	12	+51
Restaurant industry	61	24	15	+46
Computer industry	56	31	12	+44
Retail industry	53	28	18	+35
Accounting	42	50	8	+34
Automobile industry	48	35	16	+32
Electric and gas utilities	50	29	20	+30
Real estate industry	47	32	20	+27
Telephone industry	47	32	20	+27
Banking	46	32	22	+24
Internet industry	49	23	27	+22
Healthcare industry	51	17	31	+20
Education	48	20	32	+16
Travel industry	41	34	25	+16
Publishing industry	38	40	22	+16
Airline industry	41	33	26	+15
Oil and gas industry	43	25	32	+11
Television and radio industry	41	26	34	+7
The legal field	34	38	28	+6
Movie industry	37	30	33	+4
Advertising and public relations industry	33	34	32	+1
Sports industry	30	29	40	-10
Pharmaceutical industry	34	17	49	-15
The federal government	30	20	50	-20

Source: Gallup, <https://news.gallup.com/poll/319256/farming-rises-sports-tumbles-industry-ratings.aspx> (PDF download available at the bottom of the article).

THE MORE FAVORABLE ATTITUDE OF THE CITIZENS TOWARD GMOS SUPPORTS A NEW REGULATORY FRAMEWORK IN THE EUROPEAN UNION



A review of public perception on GM crops in the European Union was conducted out of the National Institute of Research and Development of Biological Sciences in Romania. The research worked to understand the difference in opinions of EU residents on the use of GM crops in the past 20 years.



KEY Insights:

The percentage of EU citizens concerned about the presence of GMOs in the environment has decreased from 30% (in 2002) to 19% (in 2011).

The level of concern about the use of GM ingredients in food or drinks has decreased from 63% (in 2005) to 27% (in 2019).

Overall, the study revealed that cause for concern among EU residents on the topic of GM crops has decreased dramatically which will hopefully allow for changes in regulation for research and production of these beneficial crops.

Source: Mihael Cristin Ichim (2021) The more favorable attitude of the citizens toward GMOs supports a new regulatory framework in the European Union, GM Crops & Food, 12:1, 18-24, DOI: 10.1080/21645698.2020.1795525

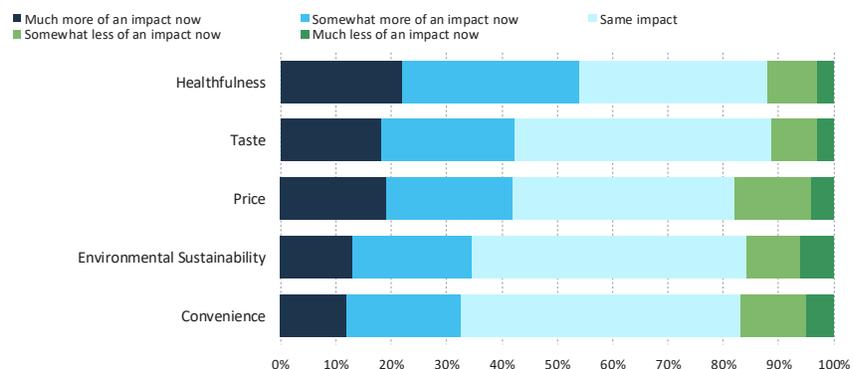
INTERNATIONAL FOOD INFORMATION COUNCIL 2020 FOOD & HEALTH SURVEY

The IFIC is a non-profit educational organization created to share science-based information about health, nutrition, food safety and agriculture by nutrition and food safety experts. This survey was conducted to understand American consumers perceptions, beliefs and behaviours around food and food purchasing decisions. The survey was conducted online with 1011 Americans, aged 18-80 from April 8th to April 16th, 2020. The results were weighted to represent the American population, specifically by age, education, gender, race/ethnicity and region.

KEY Insights:

Overall, more than half of Americans say that the healthfulness of food drives purchasing decisions more now than in the past with taste and price following close behind.

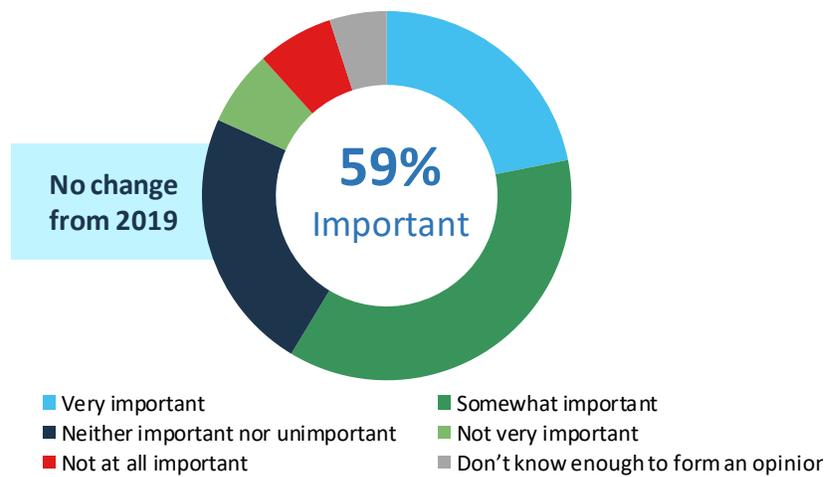
Self-Reported Change in Purchase Drivers Over the Last 10 Years



Q12: For each of the following, how has the impact on your decision to buy foods and beverages changed over the last 10 years? (n=1,011)

Importance of Environmental Sustainability in Food Products Purchased

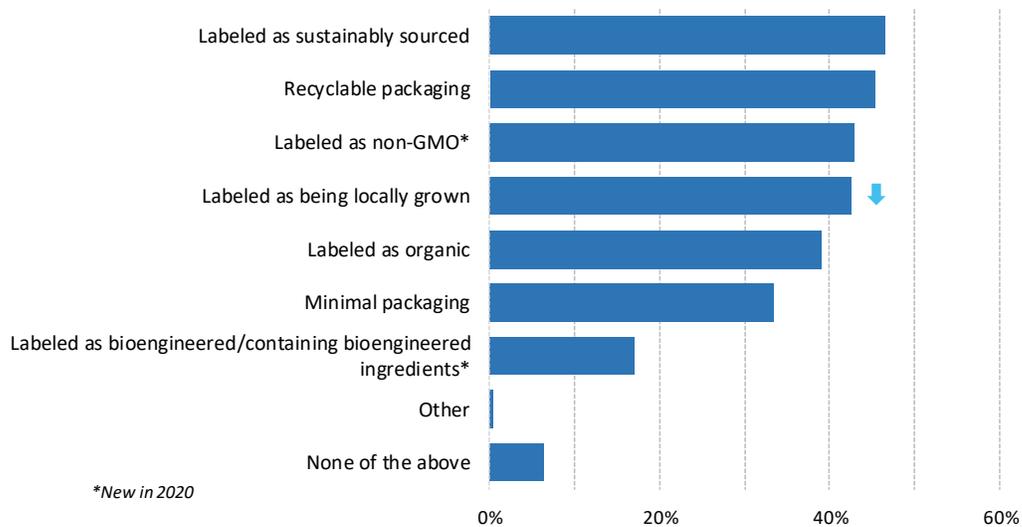
59% of respondents indicated that environmental sustainability in food products is important.



A food product being labelled as sustainably sourced and uses recyclable packaging are the main factors consumers look for when seeking sustainable food options.

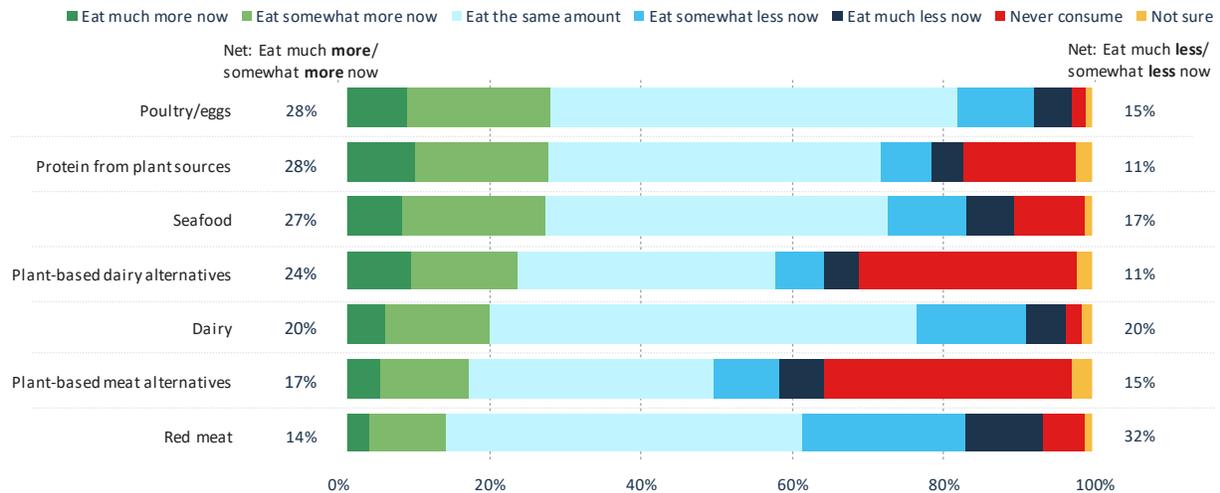
Perceived Factors to Know if a Product is Produced in an Environmentally Sustainable Way

(Of those who say it's important their food be produced sustainably)



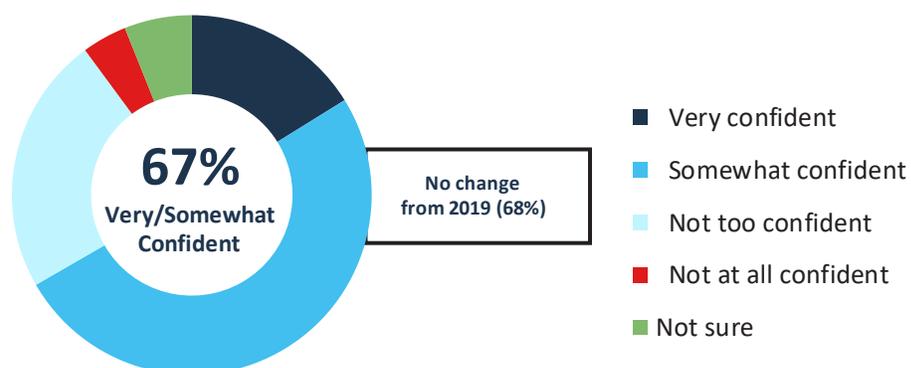
When asked if respondents have changed their consumption of protein sources, the under 35 age category is especially likely to have increased consumptions of plant-based products.

Change in Consumption of Protein Sources in the Past 12 Months



Overall, 67% of respondents indicated they were somewhat or very confident in the U.S. food supply. Those in good health, with a partner or over 65+ were more likely to be confident compared to others.

Confidence in the Safety of the U.S. Food Supply



Source: Food Insight, The International Food Information Council, <https://foodinsight.org/2020-food-and-health-survey/>



CCFI RESEARCH ADVISORY PANEL

A special thanks to the following CCFI Research Advisory Panel members for sharing their insights and expertise related to the 2020 Public Trust Research and beyond.

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John Jamieson

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RESEARCH FUNDING

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 Canadians related to trust and issues in food and agriculture. Additional insight, segmentation, provincial data and detail is available to CCFI members.

With thanks to the following for their investment in additional provincial data collection and reporting to advance public trust efforts in their provinces in 2020:

Alberta Agriculture and Forestry

Nova Scotia Department of Agriculture

Prince Edward Island Department of Agriculture and Land

OUR APPRECIATION

The Canadian Centre for Food Integrity would like to express our sincere appreciation to our members and Board for their continued expertise, support and partnership.



THE CANADIAN CENTRE FOR FOOD INTEGRITY

CONNECTING WITH CANADIANS

The Canadian Centre for Food Integrity coordinates this research for the benefit of 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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