



2021

PUBLIC
TRUST
RESEARCH



THE CANADIAN CENTRE FOR
FOOD INTEGRITY



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FOOD INTEGRITY

The Canadian Centre for Food Integrity (CCFI) is a national charity with a purpose to cultivate implicit trust in the Canadian food system. CCFI works to foster relationships with organizations dedicated to advancing public trust and create a community to achieve measurable increase. Through coordination of a united food industry - together, increasing public trust in the Canadian food system is achievable.

VISION

Elevate Canada's food system to be the most trusted in the world.

MISSION

Build public trust in Canada's food system by leading through transparent two-way communications, research and resources.



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A photograph of a person's hands typing on a silver laptop keyboard. The laptop is open, and the screen shows a grid-like pattern. In the foreground, there is a white notebook with a pen resting on it. A glass of water is visible in the background. A large white diagonal shape is overlaid on the left side of the image, containing the text.

THE 2021 RESEARCH



METHODOLOGY

The Canadian Centre for Food Integrity's 2021 Public Trust report will provide an in-depth look into public trust in Canada's food system. Our annual survey - now in its sixth year - is a strong, foundational resource. The report reflects both qualitative and quantitative research methodologies to gain a full understanding of what Canadians are thinking when it comes to the food system. The 2021 report was conducted on behalf of CCFI by Ipsos Public Affairs.

1 Qualitative Research

In order to understand what Canadians are thinking, the 2021 public trust research includes findings from qualitative research focus groups across the country. The value of qualitative research is in hearing first-hand what matters to research participants, in their own words and free from the constraints of a structured quantitative questionnaire. This methodological approach provides a rich understanding of the factors, and interplay of factors, that shape attitudes, perceptions, and behaviours.

Four online focus group discussions were held on July 13th and July 15th, 2021. The groups were segmented by region: Atlantic Canada, Great Toronto Area, large urban centres in Western Canada and smaller and rural centres in Western Canada. The participants represented a diverse group, across all age groups.

Participants were recruited using established qualitative research panels and in line with market research industry guidelines. Those who work in

market research, public relations, advertising, government, and the agri-food sector were excluded from the study, as were those who attended more than four qualitative research studies in the past five years or within the past six months. Screening on gender, age, household income, highest level of education completed, and employment status was performed to ensure participants were from all walks of life.

The findings from the qualitative discussions intend to provide depth and additional context to the statistically representative survey findings included in this report.

Objectives:

- Identify the factors that influence public perception of the Canadian food system
- Understand the relationship between the factors that influence public perception
- Explore Canadians' relationship with the food system
- Identify major trends and reasons for distrust

2 Quantitative Research

The online survey was conducted from August 27th to September 23rd, 2021, collecting results from a sample of 2,202 Canadians. A total of 2,002 completed the survey online and 200 Prince Edward Island residents completed the survey by telephone.

Quotas and weighting were employed to ensure that the sample's composition reflects the overall population according to census information. Those who work in market research, public relations, advertising, government, and the agri-food sector were excluded from the study. The precision of online polls is measured using a credibility interval. In this case, the results of this research are accurate within +/- 2.4 percentage points or 19 times out of 20 if all Canadian adults had been polled.

Significant differences between 2020 and 2021 research have been designated as follows:



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
- Build a better understanding of emerging issues that will increasingly impact the food system

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. In 2021, there is research insights from Nourish Trend Marketing, BC Agriculture Council, the Government of Saskatchewan, Edelman Trust Barometer and peer-reviewed research articles. The external research enriches and supports the CCFI research results.

The insights provided in this report are designed to help the entire Canadian food system understand consumers, gain tools to share credible information and work towards the final goal of increasing public trust. The information in this report is a summary of the 2021 research, which is meant to be shared broadly. CCFI members have access to the full comprehensive results and customized insights. Please contact CCFI directly to find out more information relating to the 2021 results.



A woman wearing a blue hijab and a blue and white plaid shirt is smiling while looking at a laptop. She is standing in a garden with wooden trellises and green plants. A large white triangle is overlaid on the left side of the image, containing the text.

WHAT DOES THE DATA TELL US?



Every year, after reviewing the research, analyzing the results, and reflecting on the questions, clear themes arise that indicate how Canadians are feeling about the food system at that particular time. These themes demonstrate issues, strengths and vulnerabilities that partners in the food system need to watch and prepare for as the year comes to an end. **The 2021 data shows that Canadians are concerned about the food system as a whole, they are feeling information overload, the pandemic didn't have as significant effect as originally believed and the need for credible information delivered through a diversified farming community is critical.**

Big Picture Thinking

Canadians are interested in improving the food system as a whole. **The intricate details are becoming less of a concern while food affordability, profit driven systems and sustainability are top of mind.** Although items such as antibiotic and pesticide use are important, the concern for these particulars are declining and the results show that **consumers are interested in the advancing 'big picture' topics instead.**

- Through listening to the open conversation in the qualitative research and seeing the top reasons why Canadians feel the food system is headed in the wrong direction - it became apparent that consumers are concerned about a food system that is entirely profit driven. Now, as everyone knows, food production is a business that does need to make money but Canadians fear that the only thing on the food systems agenda is profit.
- Since CCFI has begun tracking data, the most prominent life issue has been food affordability. The rising cost of food and food affordability are

key issues among Canadians and the fear of a profit driven system is supporting these concerns.

- **For the first time, sustainability and environmental concerns have made the top five list of life issues.** This data demonstrates Canadian's desire for a sustainable food system and the influence that the environment has on consumers everyday lives.

Information Overload

The 2021 results for CCFI's overarching question, "Do you feel the food system is headed in the right direction", establish how overwhelmed Canadians are with information. **Yes, there is an eight point drop in those who feel the food system is headed in the right direction, but the important point to note is that all of those respondents jumped to the "Don't Know" category, not the "Wrong Direction" option.** The sheer amount of information available at our fingertips is unfathomable, whether that be credible

facts and research or complete misinformation and Canadian's struggle to decipher which is which. **Respondents do not feel they can confidently say that the food system is moving in the right or wrong direction because they simply don't know what information to trust.** One of the main reasons that respondents indicated they feel the food system is headed in the wrong direction is lack of transparency. Although there are numerous credible sources available for information about the food system, the information doesn't appear transparent due to the vast amount of conflicting misinformation. Canadians are overwhelmed and don't know what information to trust.

Overstated Pandemic

The vast majority of respondents indicated that they did not feel it was more difficult to get the food they wanted since the pandemic, with some even

indicating it was easier. This is a win for the food system, but it also reflects that, **although the global pandemic has greatly affected each and every Canadian - public trust in the food system has not been altered.**

Diversified Community

Through years of results, it is clear that Canadians trust farmers. They want to hear from farmers about how their food is produced, their food fears and everything in between. This year, the research set out to find what farmers look like to consumers. "Weathered", "Simple", and "Man" were among the top responses. These results reflect the imagery that is currently being presented and demonstrate how Canadians view the food system. Results also indicated that respondents do not feel this is representative of the farming community today and **an increase in diversity is necessary moving forward.**





EXPLORING KEY
METRICS

ARE WE HEADED IN THE RIGHT DIRECTION?

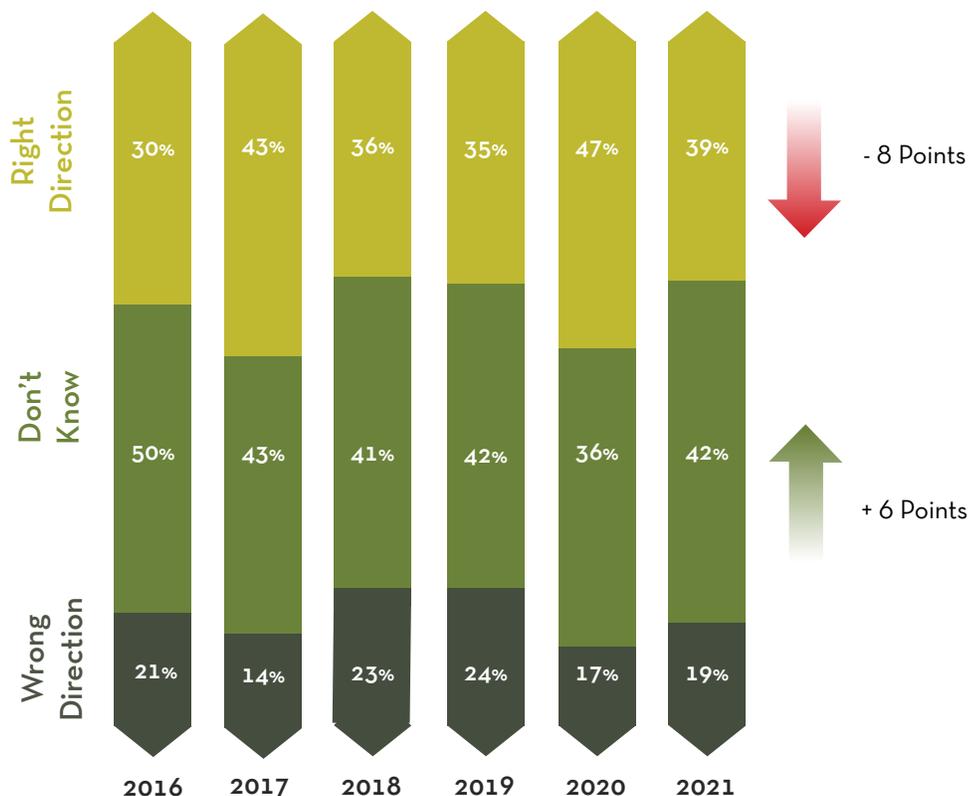
After considerable improvement in 2020, we are seeing a significant decline in those who feel the food system is headed in the right direction this year. Most of this movement can be attributed to an increase in the number of Canadians who say they “Don’t Know” as the results show that there is no significant increase in those who feel the food system is headed in the wrong direction.

When Canadians responded saying that the food system is going in the right direction, they mentioned this was because of:

- **Regulatory System** - Food inspections, sanitary regulations and public health responses to food safety issues were mentioned. There was a general impression that Canada’s regime on food production and safety is more stringent than that in other countries.

When Canadians responded saying that the food system is going in the wrong direction, they mentioned this was because of:

- **Lack of Transparency** - This was discussed mainly in reference to food processing and a desire for more information on ingredients to help participants make informed choices.



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?

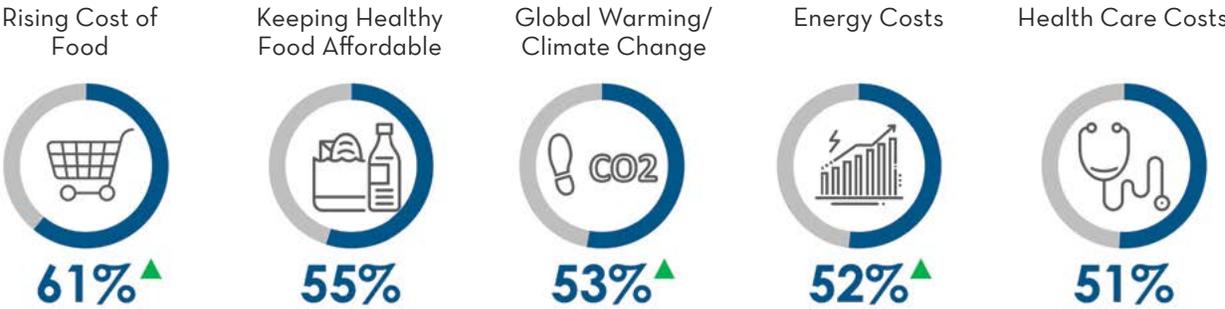


LIFE ISSUES

As in past years, when given a list of life issues – Canadians are most concerned about the rising cost of food in Canada followed by keeping healthy food affordable. In 2021, respondents indicated that global warming/climate change and energy costs are of increasing concern as they made the top 5 list this year. With clear majorities expressing concerns over food prices and affordability, the responses suggest that healthy food might be becoming too expensive for many Canadians.

TOP FIVE ISSUES

2021



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

2020





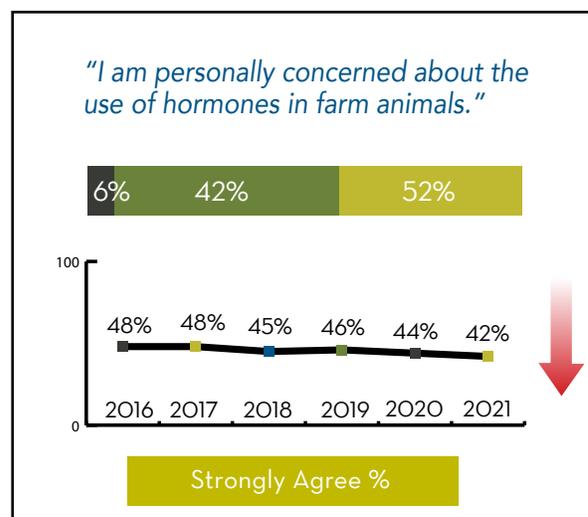
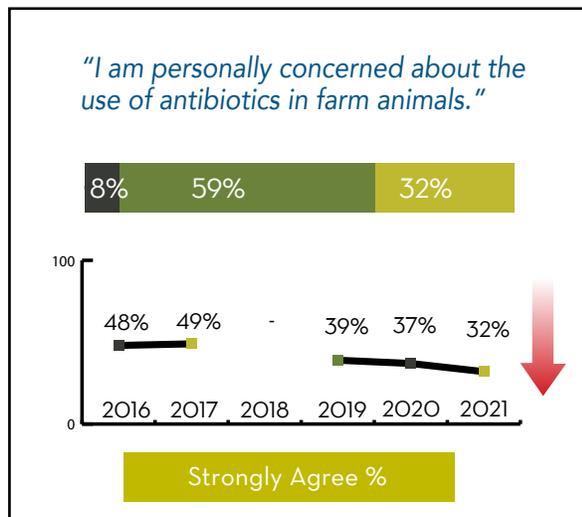
PUBLIC TRUST TRACKING OVER TIME

Overall, Canadians have shown a significant decrease in concern over pesticides used in crop production, food from genetically engineered crops, antibiotic use in animal production, and the point of view that organic food is healthier.

The 2021 results highlight that trust in the food system has decreased, but a majority still do agree that they trust food produced in Canada more than they trust food produced outside of the country. The results demonstrate declining numbers in three important metrics: those who say they trust the food inspection systems, those who feel Canadian meat

is derived from humanely treated animals and those who think that Canadian farmers are good stewards of the environment. These will be results to closely track moving forward.

Take note - results are showing that respondents are less concerned about the intricacies of the food system and more concerned about the 'big picture' of Canadian food.





EXTERNAL
PUBLIC TRUST
RESEARCH

Government of Saskatchewan Public Trust Research

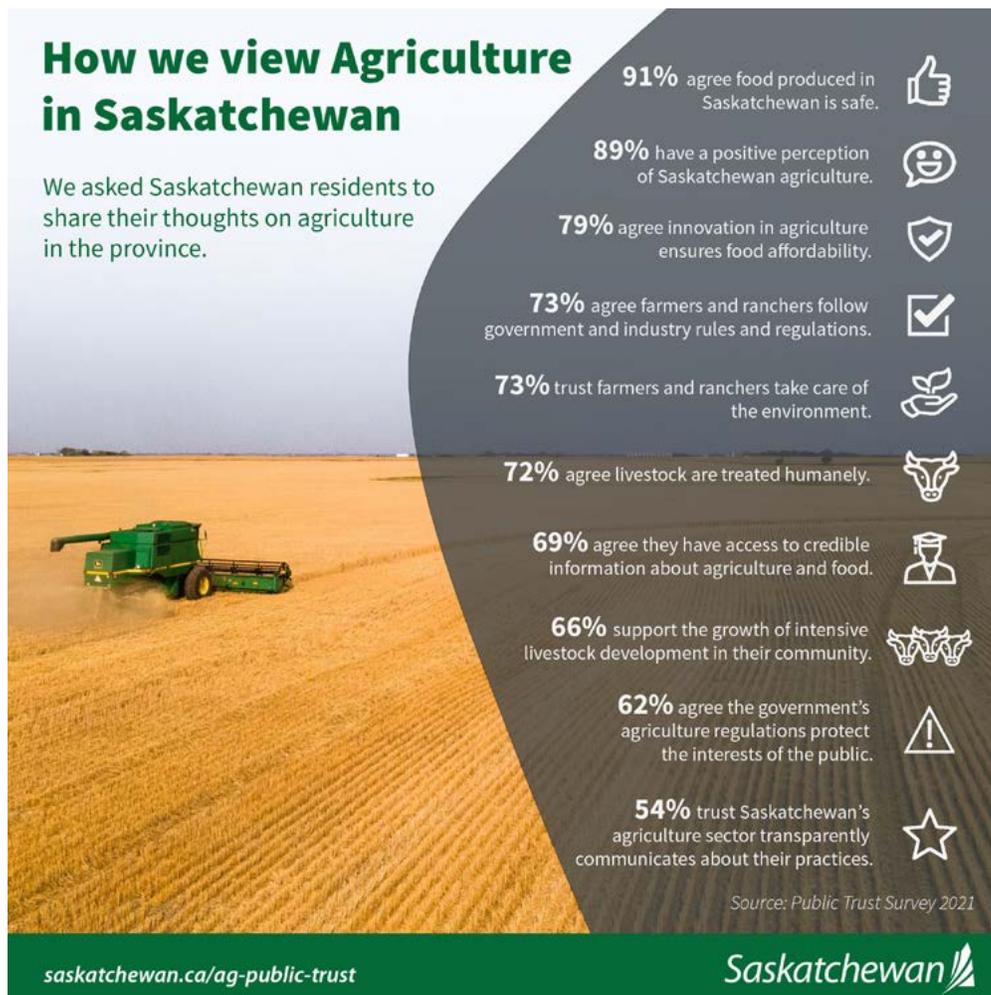


The 2021 survey asked 801 Saskatchewan residents' representative of the provincial population in May 2021.

Overall, Saskatchewan residents have a positive perception of Saskatchewan agriculture. For example, 89 per cent of respondents "agreed" or "strongly agreed" to the statement I have a positive perception of Saskatchewan agriculture. Furthermore, 91 per cent of respondents agree food produced in Saskatchewan is safe. The survey continues to show high positive responses to questions related to the humane treatment of animals, environmental stewardship, innovation in agriculture and food safety. Questions gauging whether the government's regulations

for agriculture protect the interests of the public and the transparency of the agriculture sector's communications of practices, show lower positive perception compared to other questions.

Access to credible information about agriculture proved to be an important driver of public trust. When analyzed against the other nine public trust questions, agreeing that one had access to credible information about agriculture, made respondents more likely to agree with the other questions. This shows that access to credible information is more important than demographics and ought to remain a pivotal focus of the industry.



BC Agriculture Council Community Engagement Consumer Research 2021

Strengthening public trust and engaging with consumers is a priority initiative for BC Agriculture Council (BCAC) and its members. Since 2018, BCAC has conducted consumer research to better understand the perceptions British Columbians have about the food system. The latest survey results are based on an online study conducted May 12 to 15, 2021 among a representative sample of 831 residents across B.C. The margin of error is +/- 3.4 percentage points, 19 times out of 20.

For the full report, please visit: bcac.ca/community-engagement/resources

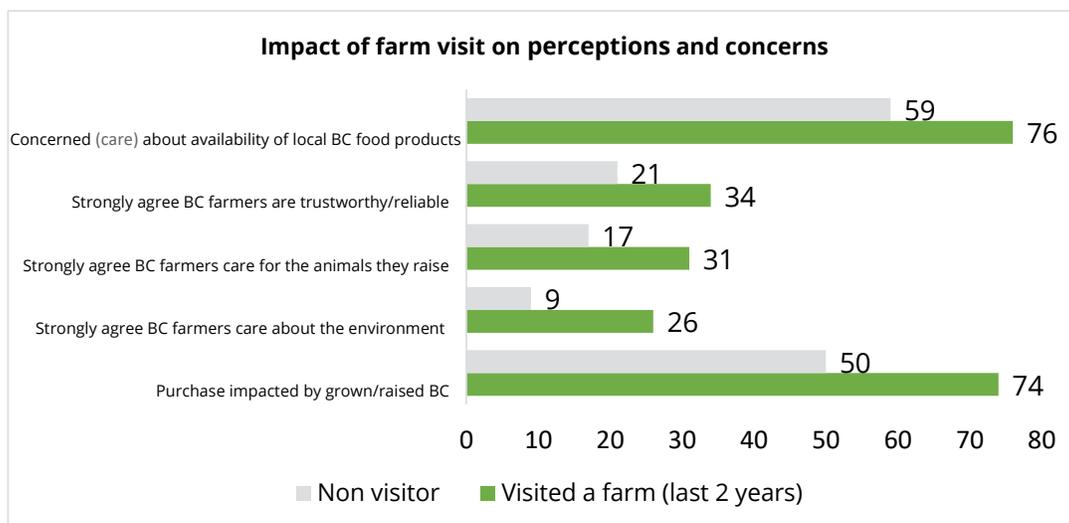
Key Findings

British Columbians continue to have very positive views of B.C. farmers.

Local origin (B.C.) and certification are important to a vast majority of shoppers and can largely impact the purchasing decision for many.

British Columbians who have recently visited a working farm are more likely to be impacted by local origin and have more positive opinions of B.C. farmers.

Food system issues remain important to British Columbians.





Canadian Consumer Risk Perceptions of Food Production Survey

Research by: Claire Williams, Savannah Gleim , Stuart J. Smyth and Diego Maximiliano Macall

The survey focused on identifying what benefits and risks consumers associated with different food production techniques. **Twenty-four percent of respondents indicated they were not at all familiar or were unsure of their degree of familiarity about agricultural biotechnology. Familiarity had a strong correlation to gender, age, and level of education and a weaker but significant correlation for province/territory. Females indicated they were less familiar than males, older respondents were more familiar than younger and the higher the level of education, the greater the familiarity.** Those living in the Western Canadian provinces expressed greater familiarity. When asked about physical differences between biotech and non-biotech foods when label information is scarce, 49% of participants associated increased physical food size with genetically modified food.

Nourish Trends Report

The fifth annual Nourish Trend Report is our look at the forces driving change across the entire food continuum – retail, production, foodservice, agriculture, and our home kitchens. How has the future of food and agriculture shifted as a result of the pandemic?

Predicting the future based on an unforeseen present is a challenge, but Nourish Network assembled 12 critical food, beverage, and agriculture trends that will significantly shape the industry and consumer landscapes well into the future:

- Two Canadas: The Polarization of Society
- Set the Table: Return of the Family Mealtime
- Values-based Eating: Social Justice in the Food Industry
- Knowledge-based Eating: Radical Transparency & Full Disclosure
- Ethics-based Eating: Reducing Your Environmental Impact
- Beyond Local: Hyperlocalization of Products & Services
- Functional Food 2.0: Eating for Resiliency & Preventative Healthcare
- The Rise of Omnichannel: Part I – Linking Purchase & Prep Through Digital
- The Rise of Omnichannel: Part II – Unbundling the Restaurant Experience for Home
- Help Wanted: Filling Employment Gaps in the Agri-food Sector
- Grassroots Movement: Investing in Soil Health for Industry & the Environment
- Next-Gen Farming: Accelerated Integration of Digital Tech & Agriculture

For the full report, please visit: <https://www.nourishnetwork.ca/>



Edelman Trust Barometer



The 21st Annual Edelman Trust Barometer report was conducted from October 19th to November 18th, 2020, using an online survey in 28 countries with 33,000+ respondents. The overall theme from the results was Declaring Information Bankruptcy. This report is a global scale research survey that explores trust levels across industries and provides context into how Canada ranks compared to other countries.

The report reveals that trust in most information sources is at record lows, societal leaders are not trusted to do what is right and that business is expected to fill the void left by government. The research suggests the following are innovative ways to build public trust across the board.

EMERGING FROM INFORMATION BANKRUPTCY

1.

Lead with facts, act with empathy

Societal leaders must have the courage to communicate transparently, but also empathize and address people's fears.

2.

Provide truthful, unbiased, reliable information

All institutions, including media, must provide truthful and trustworthy information.

3.

Business: Embrace imperative to lead or fall behind

Business must lead and communicate through their own channels on issues from pandemic impact and systemic racism to climate change.

4.

Partner across institutions

All institutions must find a common purpose and take collective action to solve societal problems.



The full 2021 Public Trust Research provides an extensive understanding of Canadians' perceptions of the food system, emerging trends and best practices moving forward. The report contains additional tracking trends that reveal what Canadians are personally concerned about as well as both quantitative and qualitative research findings exploring topics such as science & gene editing, the effect of the pandemic, local & sustainable as well as perceptions of Canadian farmers. All of this information, including the demographic breakdowns, are available to CCFI members. For more information on how to join CCFI's community, please visit our website at

www.foodintegrity.ca/about/members

CCFI RESEARCH ADVISORY PANEL

A special thanks to the following CCFI Research Advisory Panel members for sharing their insights and expertise related to the 2021 Public Trust Research and beyond.

Dr. Amy Bowen

Director, Consumer Insights, Vineland Research & Innovation Centre

Dr. Andreas Boecker

Associate Professor, Food, Agricultural and Resource Economics, University of Guelph

Dr. Bobby Thomas Cameron

MPPA, BA, CE, Director, Strategic Policy and Evaluation Division, Department of Agriculture and Land, Government of Prince Edward Island

Dr. Ellen Goddard

Professor and Co-operative Chair, Agricultural Marketing and Business, University of Alberta

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Paighton Smyth

Partner Engagement Coordinator, Canadian Centre for Food Integrity

John Jamieson

CEO & President, Canadian Centre for Food Integrity

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 including government, industry, retail and producers with a commitment 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 Prince Edward Island Department of Agriculture and Land for their investment in additional provincial data collection and reporting to advance public trust efforts in PEI.

OUR APPRECIATION

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. CCFI 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 is 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.

www.foodintegrity.ca

learnmore@foodintegrity.ca

[@FoodIntegrityCA](https://www.instagram.com/FoodIntegrityCA)

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