

THE CANADIAN CENTRE FOR FOOD INTEGRITY

2023 PUBLIC TRUST RESEARCH REPORT



A photograph of a man and a woman looking at produce in a grocery store. The man is wearing a white shirt and a dark jacket, and the woman is wearing a grey jacket. They are both looking down at something in a shopping cart. The background is filled with various fruits and vegetables.

WHO WE ARE AND WHAT WE DO

The Canadian Centre for Food Integrity (CCFI) is a national not-for-profit charity with a mandate to help Canada's food system earn public trust by coordinating:

research, resources, & dialogue.

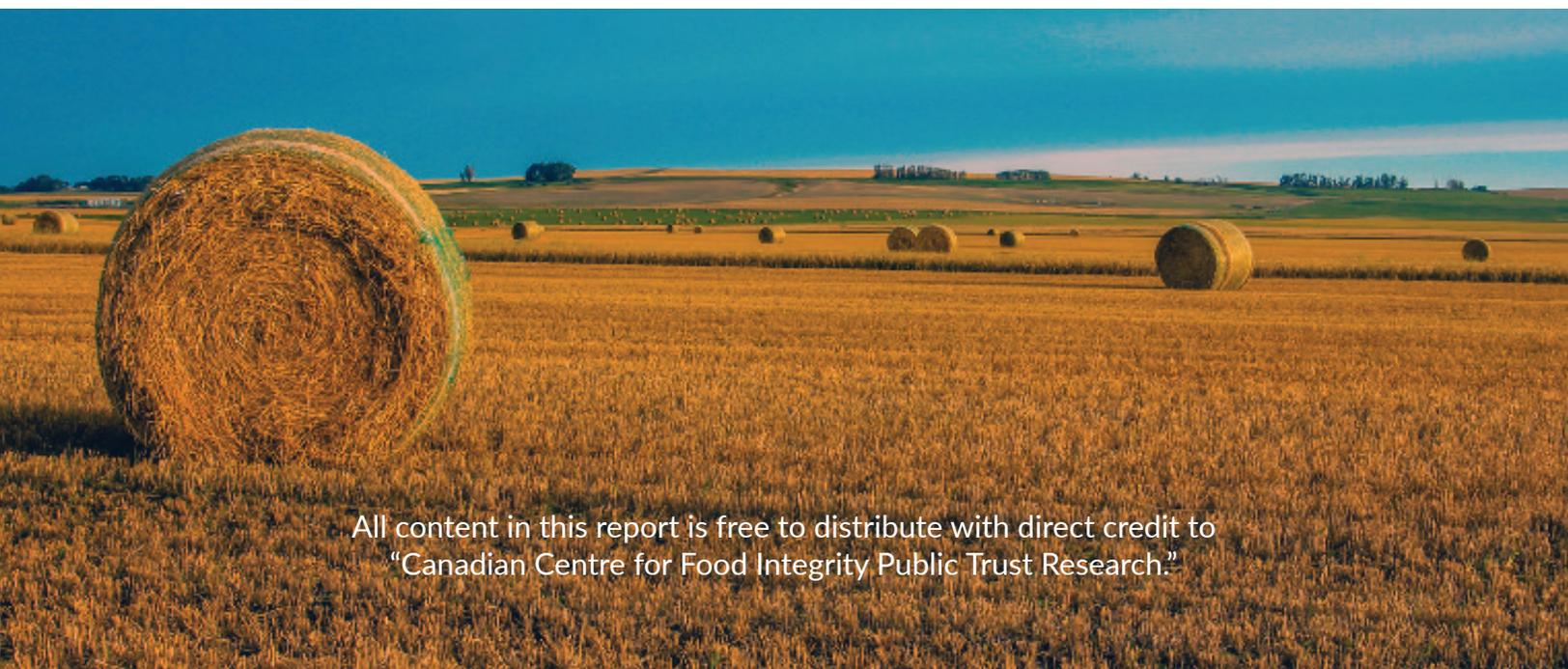
We are a collaborative, coordinating body that seeks to inform and elevate research-based public trust efforts across the country and food chain.

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

JOIN. INVEST. DONATE.
www.foodintegrity.ca
@FoodIntegrityCA

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“Canadian Centre for Food Integrity Public Trust Research.”



**THE 2023
PUBLIC TRUST
RESEARCH**

BACKGROUND

The Canadian Centre for Food Integrity's (CCFI) annual public trust research is both a valued member resource and a gift to the food system overall. While detailed results, research materials, tailored presentations and insights are exclusive CCFI member benefits, sharing topline results widely illustrates the organization's belief that the pursuit of public trust must be an open and collaborative journey.

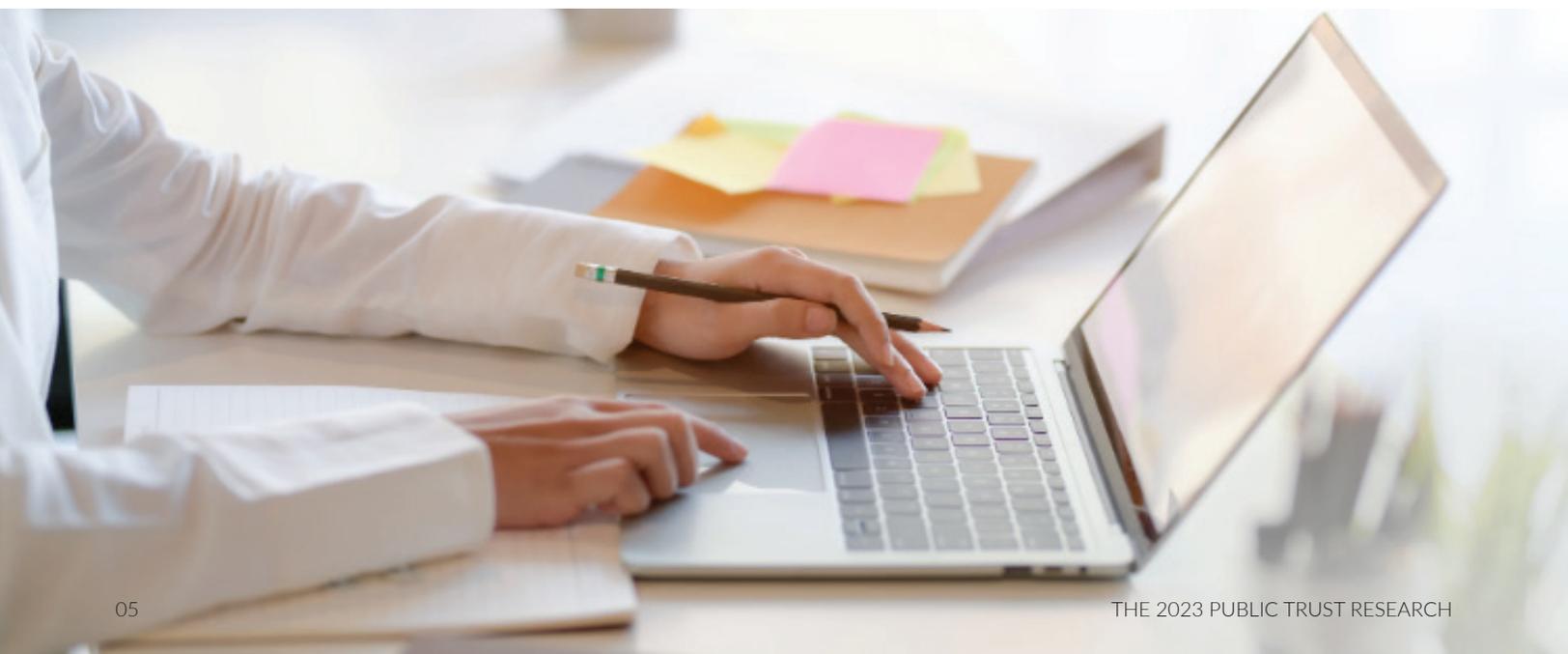
The 2023 research was conducted from July 10th to 24th via Ipsos Public Affairs among a representative sample of n=2,670 Canadians aged 18+. Quotas and weighting were used to ensure the sample reflects the overall Canadian population according to the most recent census information.

Typical national survey base sizes are around 1000 respondents. CCFI's larger base size allows for an improved credibility interval and therefore more reliable data compared to other studies. A credibility interval is how the precision of online polls is measured. In this case, the results are accurate to within +/-2.2 percentage points, 19 times out of 20, of what the results would have been had all Canadian adults been polled. CCFI's large and reliable base size is rooted in our commitment to minimum base sizes across the country. This provides meaningful provincial analysis to our members in all parts of Canada.

The breakdown of interviews by province is detailed below. An oversampling of interviews was conducted in Manitoba.

2023 PUBLIC TRUST RESEARCH SAMPLE SIZES

TOTAL	BC	AB	SK	MB	ON	QC	NB	NS	PEI	NL
2670	300	200	99	451	755	500	100	116	49	100



OBJECTIVES

The overall purpose of this research is to:

- Track public perceptions about Canadian food, agriculture, and food system issues.
- Measure public trust in Canada's food and agriculture, and food system stakeholders.
- Explore consumer attitudes and behaviours on important topics such as food safety, transparency, sustainability, and consumer habits.

REPORTING NOTES

Statistically significant differences between the current wave (2023) and the most recent previous wave of research have been designated as follows:

▲ Significantly Higher

▼ Significantly Lower

UNLOCK INSIGHTS THROUGH MEMBERSHIP

The information in this report is a summary of CCFI's annual consumer research. CCFI Members have exclusive access to the full 2023 Public Trust Research report and resources including a comprehensive report, demographic breakdowns, data tables, customized insights, presentations, and webinars.

Gain strategic advantages through our research-based insights - join CCFI's community now. Find more information on our website at www.foodintegrity.ca/about/members.



BEYOND THE NUMBERS

Actionable
Next Steps

CCFI research goes beyond simply describing data by providing tangible 'next steps' that are essential in putting the public trust research to work. Keep an eye out for this footstep icon throughout the report for strategic insights and recommendations.



**BEYOND THE NUMBERS
- SEEING THE FOREST
AND THE TREES**

KEY FINDINGS AND IMPLICATIONS

The Canadian Centre for Food Integrity's public trust research aims to help Canada's food and agriculture system to see both the forest and the trees. Through robust detailed research we can paint a bigger picture that is rooted objective data.

1. FOOD COSTS AND AFFORDABILITY CONTINUE TO DOMINATE THE AGENDA

The cost of food is the most important issue to Canadians in their day to day lives – an unwavering fact for the last five years of CCFI's public trust research. As Canadians face other economic strains such as inflation, interest rates, and housing prices, food costs have become an increasingly acute issue. Although concern about the overall cost of food has been increasing significantly over the past few years, concern about the affordability of food has grown at an even steeper rate. Half of Canadians say they are very concerned about the affordability of healthy food compared to a year ago (47% provided a rating of 9-10) which is a significant eight points higher than last year, and a staggering nineteen points higher compared to 2020 (28% very concerned).

The cost of food and its relative affordability is a nuanced and complex issue in which a single person cannot meaningfully effect change; what Canadians can control, however, is the food they buy and eat. To that end, Canadians are adapting their consumer habits in response to the cost of food in several ways: reducing food waste (45%), cooking more meals at

home (42%), and buying less food (37%) are the top three actions cited. Compared to last year, significantly more Canadians say that in response to rising food prices, they have reduced food waste at home, bought less food, bought more frozen food, changed grocery stores and the types of recipes cooked. Along with their individual actions, Canadians have an open ear when it comes to help in mitigating the cost of food; 60% say they are interested in learning about how to spend less on food. In fact, half of Canadians say they have already been seeking out information on this topic.



BEYOND THE NUMBERS

Actionable
Next Steps

Do not be shy in addressing the reality that Canadians may have less disposable income to spend on food than they have in the past.

Acknowledge and support adaptive consumer habit shifts – provide tips on how to properly store or re-purpose leftovers, spotlight recipes that use simple or frozen ingredients, or offer smaller quantities of your product. Highlight how you or your organization is helping address this issue – from simply affirming your commitment to providing healthy affordable food to more concrete actions like partnering with school meal programs, donating to food banks, or your food loss and waste efforts are all examples of the food system continuing to work to provide healthy affordable food for all.

2. PUBLIC TRUST IN CANADA'S AGRI-FOOD SYSTEM IS STEADY, BUT RISKS EXIST.

This year's research demonstrates that overall, the public remains supportive of the food and agriculture industry's ability to innovate, grow, and operate freely. Two key indicators have remained unchanged year over year: public trust across most food and agriculture stakeholders, and the proportion of Canadians who feel the food system is headed in right direction. The stability of public sentiment should not be taken for granted however, as the issue of food costs is a public trust risk requiring a collaborative approach. Canadians are becoming more cynical about the factors that are at play regarding the cost of food and these perceptions must be proactively addressed with objective information, from a trusted source, communicated empathetically. Although supply chain costs are the top reason Canadians feel is to blame for the rising cost of food (41%), this is down from 56% who felt the same last year. Concurrently, there has been significant growth in those who feel businesses wanting to increase their profits are why food costs have risen (34% vs 20% in 2022). Helping Canadians understand that our food system is a complex one with many factors impacting the cost of food can help foster informed perceptions and behaviours when it comes to the food people buy and consume.



BEYOND THE NUMBERS

Actionable
Next Steps

Canada's agri-food system needs to communicate transparently about the many factors affecting the cost of food.

Waning public acceptance of the impact of supply-chain costs on food prices should be better-addressed through demonstrating the impact fuel and other materials related to food production has on the price consumers pay. Beyond supply chain issues, Canadians under-estimate the impact other external factors have on the cost of food and should be better incorporated in communications. Very few Canadians connect world conflict, labour shortages or severe weather events to food costs – these are important missing links that need to be added to the common understanding underlying the cost of food. Along with expanding the issues the food system communicates about, the level of transparency must be improved as well. Since it was last fielded in 2018, transparency scores have significantly decreased among nearly all stakeholders tracked. There is an industry-wide need to focus on offering transparent, easy to understand information, particularly about food costs.

3. IT'S PERSONAL – CANADIANS ARE FOCUSED ON ISSUES THAT ARE CLOSE TO HOME

The top life issues this year illustrate that Canadians simply want to be healthy, in a home with nutritious, affordable food in their fridge. The more big-picture concerns such as the Canadian economy have decreased significantly while concern for more tangible issues of food, health and housing have increased. As the world is transitioning from the COVID-19 pandemic to an endemic state, a newfound appreciation for one's health reveals itself in this year's research through a renewed focus on healthcare. Nearly half of Canadians are very concerned about the issue of health care, up a significant seven points compared to last year (44% vs 37%). Health and food are closely linked and an important area of interest among Canadians. In terms of information about food that Canadians are actively seeking out – over half say they engage with information about nutrition and healthy eating (54%) which is even more than those who look up information about spending less on food (50%). Although there are some 'universal truths' about public perceptions of the agri-food system (like a desire for healthy affordable food), connecting with Canadians and earning their trust also requires understanding their individual interests, opinions, and concerns.



BEYOND THE NUMBERS

Actionable
Next Steps

One size does not fit all.

Canadians are unique – their backgrounds, experiences, and other demographics all impact who they are and how they view the food system. Your public trust efforts must also be similarly personalized. Choose your audience and tailor messaging to their concerns and interests.

CCFI members have access to more data and insights across many demographic groups - reach out to learn more!



THE BIG PICTURE



SETTING THE TABLE

Before diving into the in-depth perceptions Canadians hold about their food and how it's produced, we 'set the table'. That is, we ask Canadians two important questions:

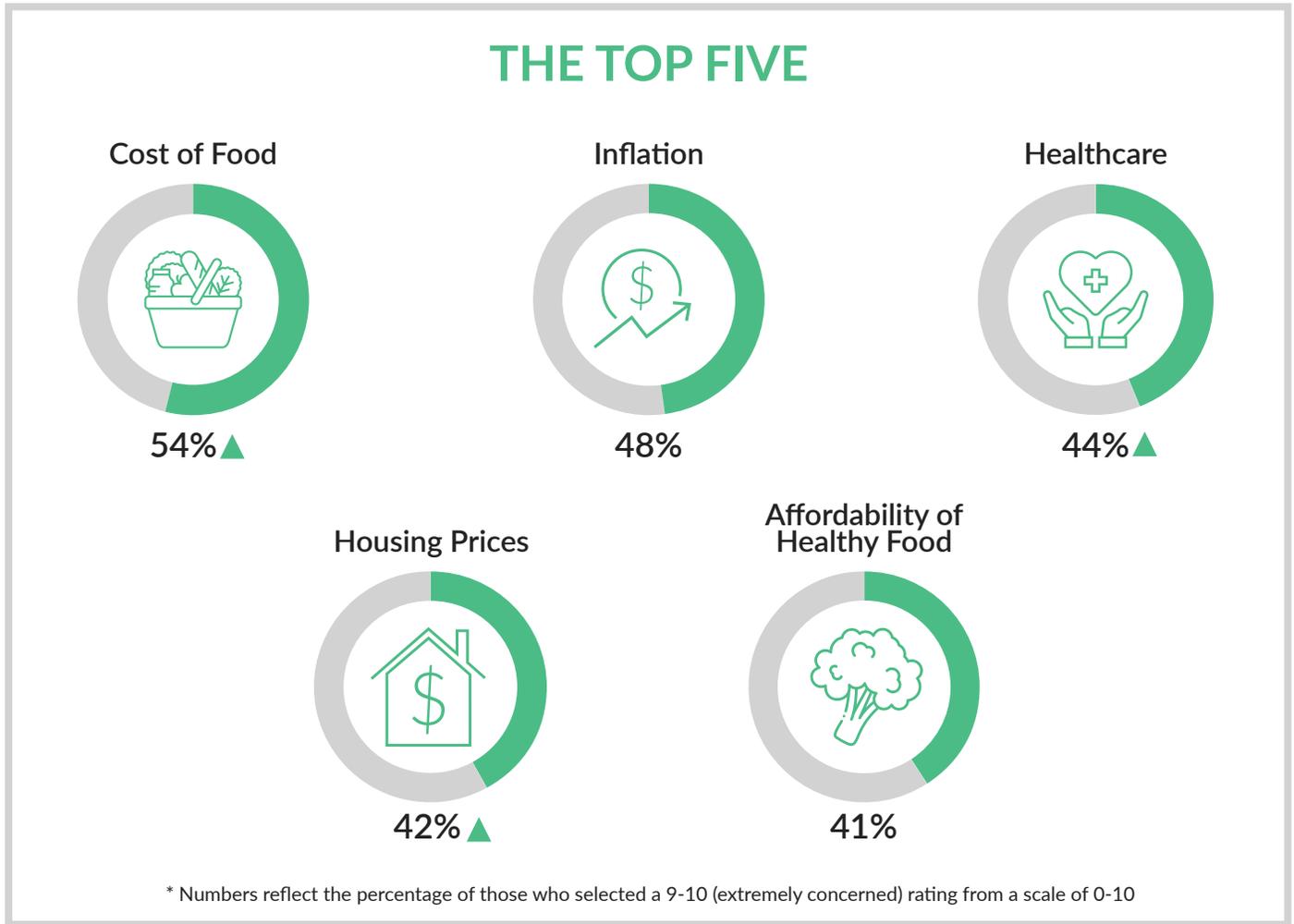
**What life issues
are they most
concerned about?**

**What direction do
they feel our food
system is headed?**

These results help provide a foundational big-picture lens through which the rest of the research findings should be viewed.

WHAT ARE CANADIANS WORRIED ABOUT?

CCFI's annual research seeks to understand the top-of-mind challenges impacting Canadians. Tracking concern about a wide range of 20+ life issues (including select farm and food topics) helps to understand the daily issues Canadians are facing and how those concerns might have changed year over year.



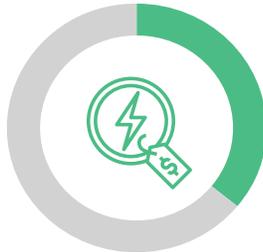
For the fifth year in a row, the cost of food remains the issue Canadians are most concerned about.

Over half of Canadians indicate they are 'very concerned' (provided a rating of 9-10 out of 10) about the cost of food, a level that has increased a significant three points compared to last year (54% vs 51%, respectively).

The cost of food is an increasingly standalone consumer concern. It is the only issue of high concern among over half of Canadians, a concern level that is six-points higher than the second ranked issue of inflation (48%). Concern about health care and housing prices have increased a significant seven and five points respectively with just over four in ten indicating they are very concerned about these issues. Affordability of healthy food rounds out the top five life issues among Canadians (41% very concerned, in-line with 2022).

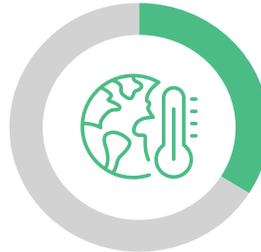
THE BACK FIVE*

Energy Costs



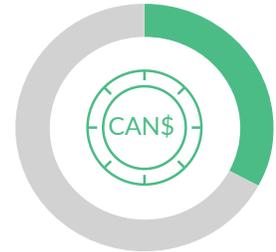
36% ▼

Climate Change



34%

Canadian Economy



33% ▼

Personal Financial Situation



30%

Safety of Imported Food



29%

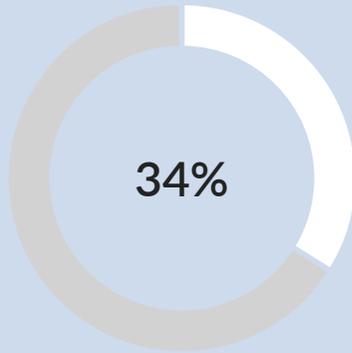
* Numbers reflect the percentage of those who selected a 9-10 (extremely concerned) rating from a scale of 0-10

Macroeconomic concerns related to the cost of energy and the national economy have significantly weakened compared to last year.

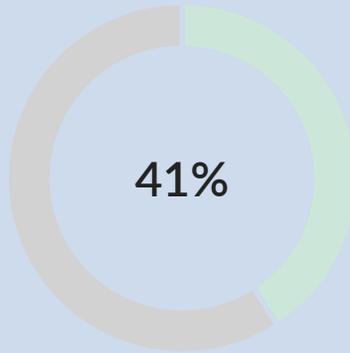
Energy costs are ranked 6th with just over a third of Canadians saying they are very concerned (36% vs 40% in 2022) while concern about the Canadian economy dropped three points (33% vs 36%) and is ranked 7th. The remainder of the top ten life issues are comparable to last year's concern levels.

* Life issues ranked 6-10

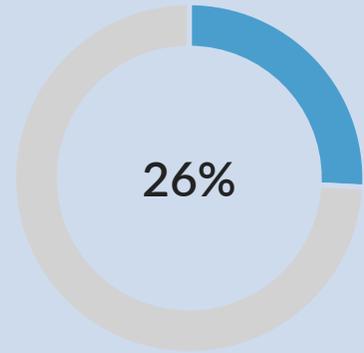
HOW DO CANADIANS FEEL ABOUT OUR FOOD SYSTEM?



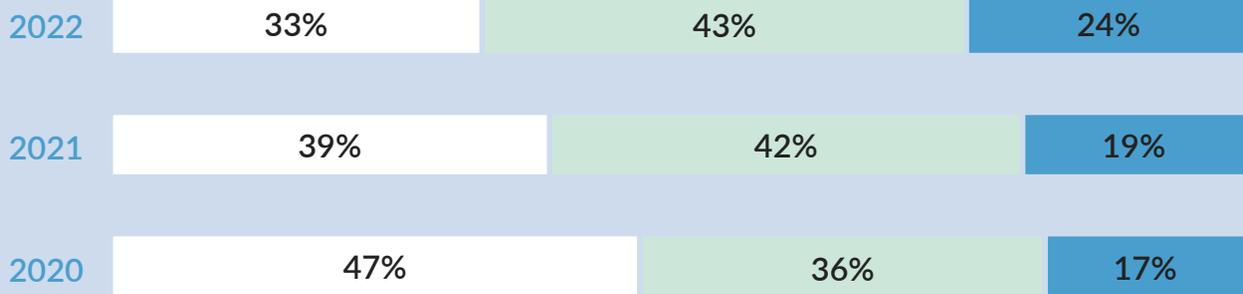
Right Direction



Unsure



Wrong Direction



Perceptions related to the direction of Canada’s food system have levelled off after steady decline since a 2020 tracking high. Most Canadians feel Canada’s food system is either headed in the right direction (34%) or are unsure (41%) while a quarter think that things are headed in the wrong direction (26%).



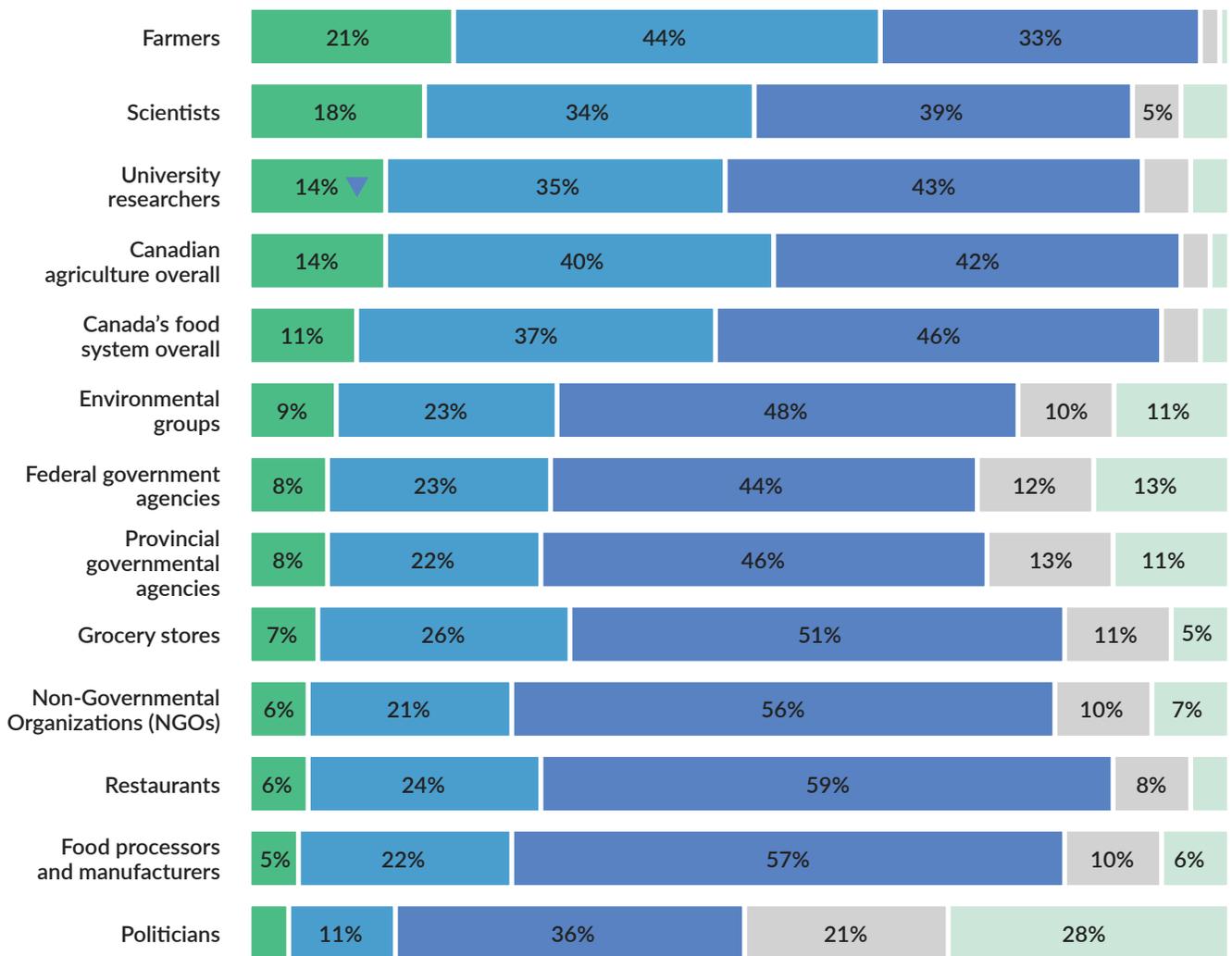


**PUBLIC TRUST,
IMPRESSIONS,
AND TRANSPARENCY**

PUBLIC TRUST – THE STAKEHOLDERS

Trust levels remain steady across nearly all food system stakeholders.

Farmers are the most trusted group followed closely by scientists (21% and 18%, respectively provided a rating of 9-10 out of 10). University researchers round out the top three despite a significant year over year decrease (14% vs 16% in 2022).



Note: Values less than 5% not labelled



PUBLIC TRUST - THE SECRET INGREDIENTS

Growing public trust in Canada's food and agriculture industry is not achieved through a single advertising campaign, infographic, or shiny website. Public trust is a nuanced concept requiring a long-term commitment to collaboration and continuous improvement.

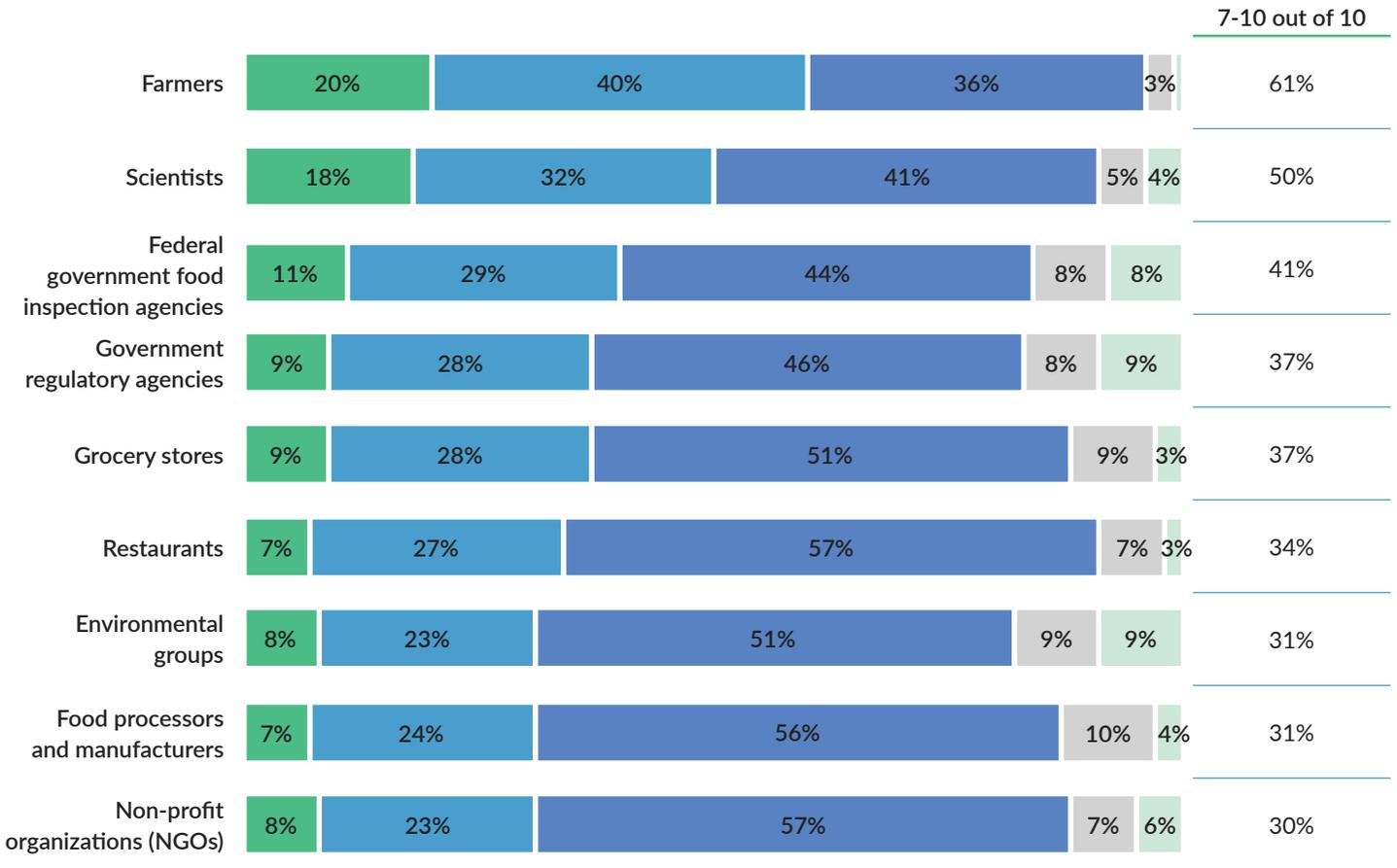
CCFI's 2022 research revealed that two non-negotiable elements to public trust are [ensuring the safety of food](#) and [providing transparent information](#). Informed by these findings, the 2023 research further investigated these areas to arm the food system with research-based insights into these two "secret ingredients".

FOOD SAFETY

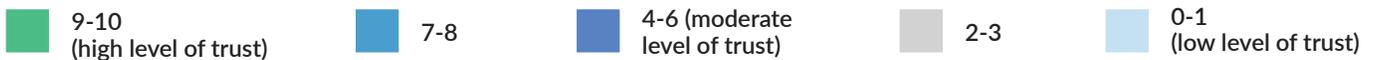
Although food safety is not a top-of-mind issue for Canadians, trusting that the food they feed themselves and their loved ones is safe is an unsaid expectation Canadians hold for the food and agriculture system. Among the 20+ life issues measured this year, concern about the safety of imported food ranked 10th (29% very concerned or provided a rating of 9-10 out of 10) while concern about food safety overall ranked 14th and was a significant four points lower than last year (26% vs 30%). It might not be the flashiest topic, and something consumers take for granted as a non-negotiable standard, but CCFI's 2022 research illustrated that providing safe food for Canadians is the cornerstone to public trust.



ENSURING FOOD SAFETY



Note: Values less than 3% not labelled



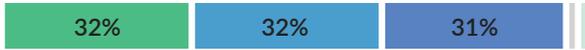
Canadians are confident that the food system ensures the safety of the food they eat. The public has at least a moderate level of trust towards all stakeholders to ensure food safety. In fact, food safety ratings are higher than trust overall and transparency scores*.

Like trust and transparency rankings, farmers and scientists are most trusted. Unlike trust and transparency, however, governmental bodies rank much higher when it comes to food safety. When it comes to the non-negotiable issue of food safety, Canadians know they can count on government inspection and regulation to ensure the food they feed themselves and loved ones is safe.

*See Page 27 for Transparency section

GOVERNMENT AND REGULATIONS

I trust food produced in Canada more than I trust food produced outside of Canada



I trust that the federal government food inspection system ensures the safety of Canadian food



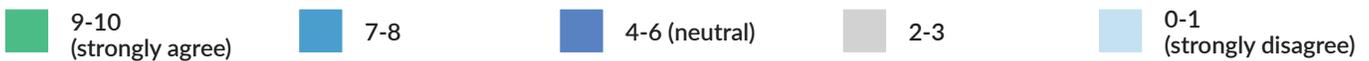
I trust imported food from the USA more than other countries



I trust food imported from other countries more than the USA



Note: Values less than 3% not labelled



BEYOND THE NUMBERS

Actionable Next Steps

Bring food safety to the forefront.

Regulations and standards are not just boxes to be checked but an important story to tell Canadians.

Like food safety, the regulation of Canada's food system is not a top concern among average Canadians – it is rated second last among the 20+ life issues, and the level of concern has remained consistent the last few years (21% very concerned). Most Canadians say they trust food produced in Canada more than imported options – a consumer shortcut that may imply they trust the food safety regulations within Canada most. Trust in the federal food inspection system to ensure food safety has been slowly increasing over the last three years – one in five provide a rating of 9-10 out of ten while very few say they do not trust the government in this regard.



TRANSPARENCY

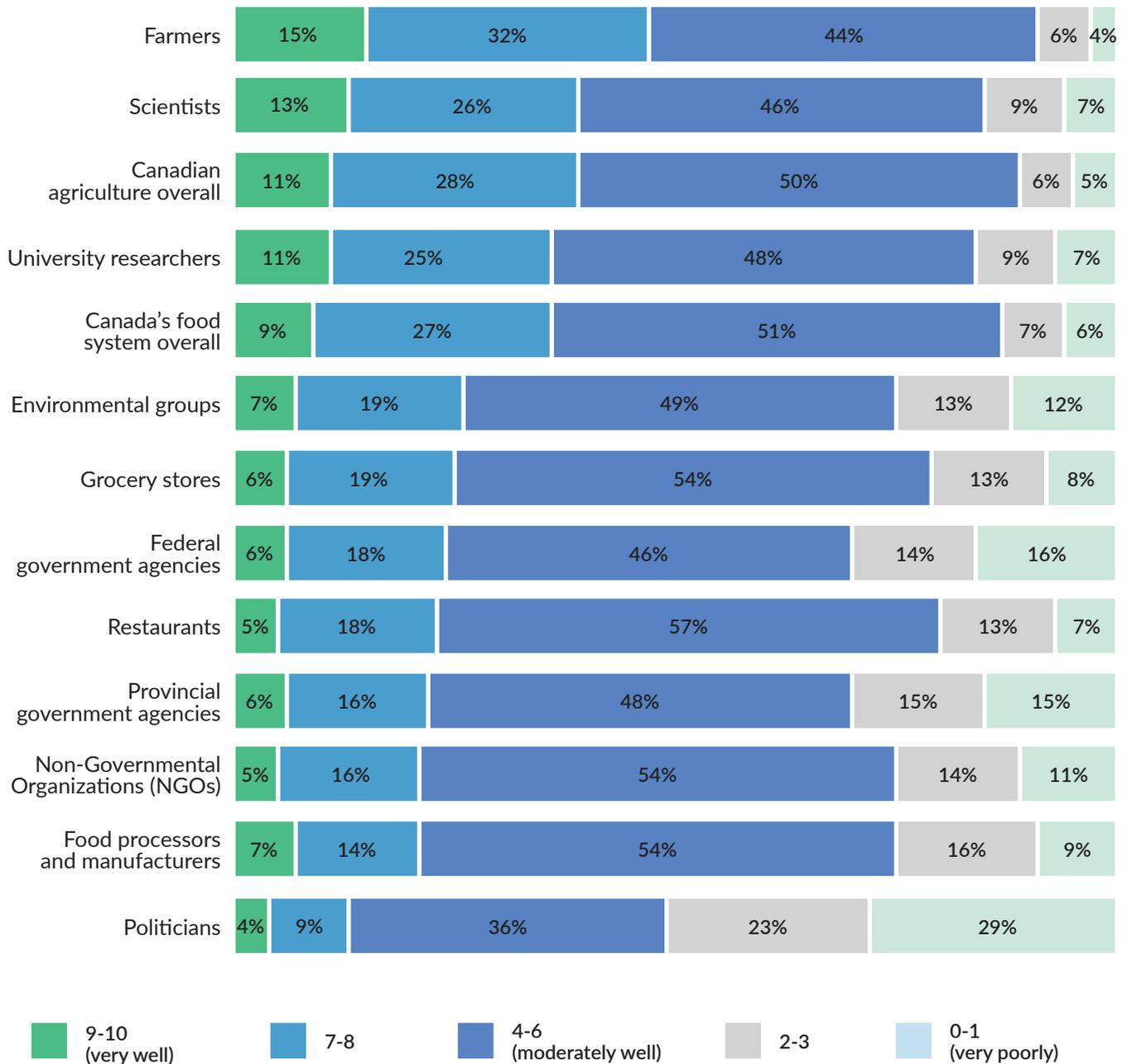
Transparency builds trust; food and agriculture stakeholders whom Canadians feel are acting transparently will also be more trusted. Like public trust, transparency can be defined and achieved in many ways. For this research, CCFI defines transparency as:

“Providing the type and amount of information, using language and terms that are easily understood, that helps you make informed decisions about food for you and/or your family.”



This year, CCFI sought to better-understand Canadians’ perceptions and expectations when it comes to meaningful transparency. To that end, this year’s research has both re-visited historic tracking and developed new areas of inquiry.

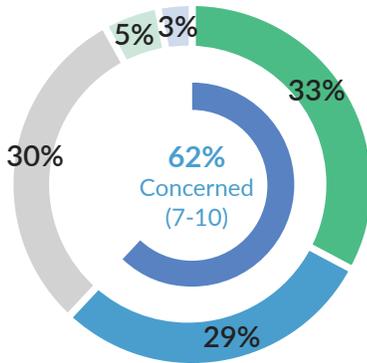
TRACKING TRANSPARENCY



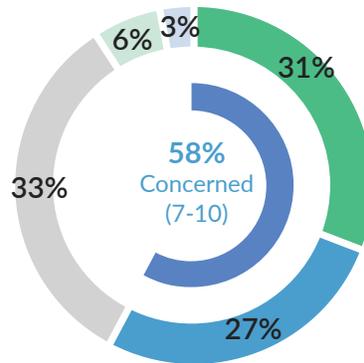
Like public trust, farmers and scientists are viewed as doing best in providing open and transparent information to help Canadians make informed food choices. Unlike public trust however, there is a higher incidence of moderate scores in terms of transparency; this suggests an opportunity to engage with Canadians about how their food is grown or produced.

TRANSPARENCY CONCERNS

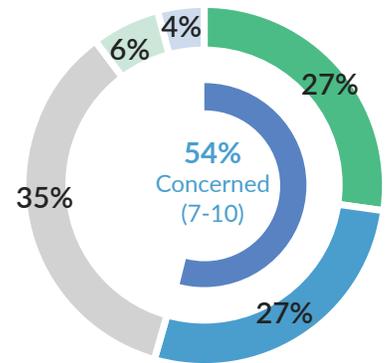
Misleading food labels or descriptions for the purpose of marketing



Misinformation or untrue information about the food that I consume



Misinformation or untrue information about how food is produced in Canada



Canadians have their guards up when it comes to information and marketing materials related to food. Concern about misleading food labels or descriptions for the purpose of marketing is the highest - over six in ten provided a rating of 7-10 out of 10 (62%) while a third (33%) are very concerned about this misleading tactic (rating of 9-10). Concern about misinformation about the food Canadians eat and how it was produced is slightly lower but still an important concern - a majority are still worried about that type of untrue information.



BEYOND THE NUMBERS
Actionable Next Steps

Winning the marketing battle can cost you the public trust war.

Assess your public-facing communications. Are they fear-based? Attacking others? Clouding the truth for your benefit? These types of marketing campaigns may help your brand or individual product in the short term, but a disingenuous approach can ultimately erode public trust across the food system.



ABILITY TO MAKE INFORMED CHOICES ABOUT FOOD

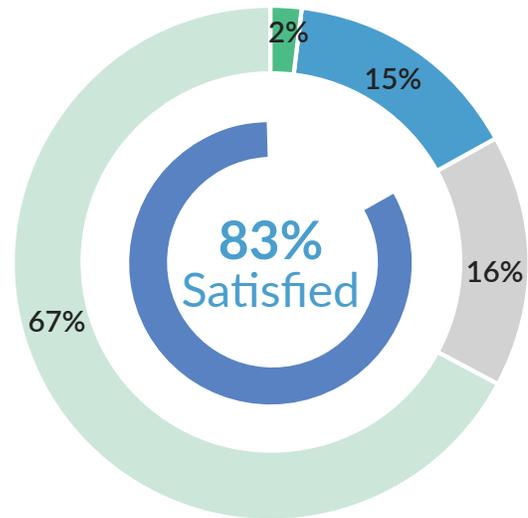


BEYOND THE NUMBERS

Actionable
Next Steps

Transparency efforts should not slow down.

Continue providing accurate information in easy-to-understand language across many platforms. Although 83% of Canadians are satisfied with their ability to make informed food decisions – only 16% are very satisfied while a majority (67%) are somewhat satisfied – there is always room for improvement.



Note: Values less than 3% not labelled



Despite concerns about misinformation, over eight in ten Canadians are satisfied with their ability to make informed choices about the food they eat. Canadians are confident in their ability to access information when they want to, a good news story for the food system and the pursuit of meaningful transparency.



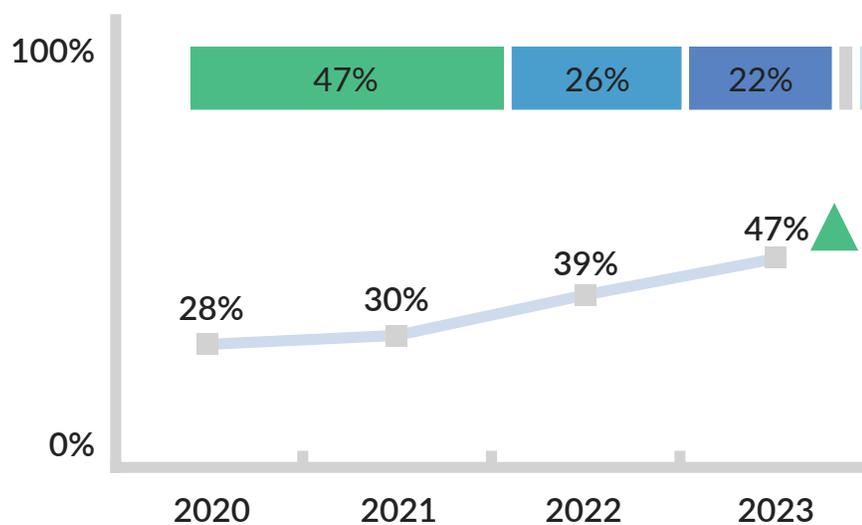
THE COST OF FOOD

AFFORDABILITY CONCERNS REACH ALL TIME HIGH

Concern about the affordability of healthy food has been rising over the years and has now reached a tracking high.

Not only is the cost of food the top life issue, but the personal impact food costs are having on Canadians is illustrated through nearly half of Canadians saying they are very concerned about food affordability compared to a year ago (47% provided a rating of 9-10 out of 10). Concern has increased a significant eight points compared to 2022 and nineteen points since 2020.

THE AFFORDABILITY OF HEALTHY FOOD COMPARED TO ONE YEAR AGO



Note: Values less than 4% not labelled

9-10 (very concerned)

7-8

4-6 (neutral)

2-3

0-1 (no concern)

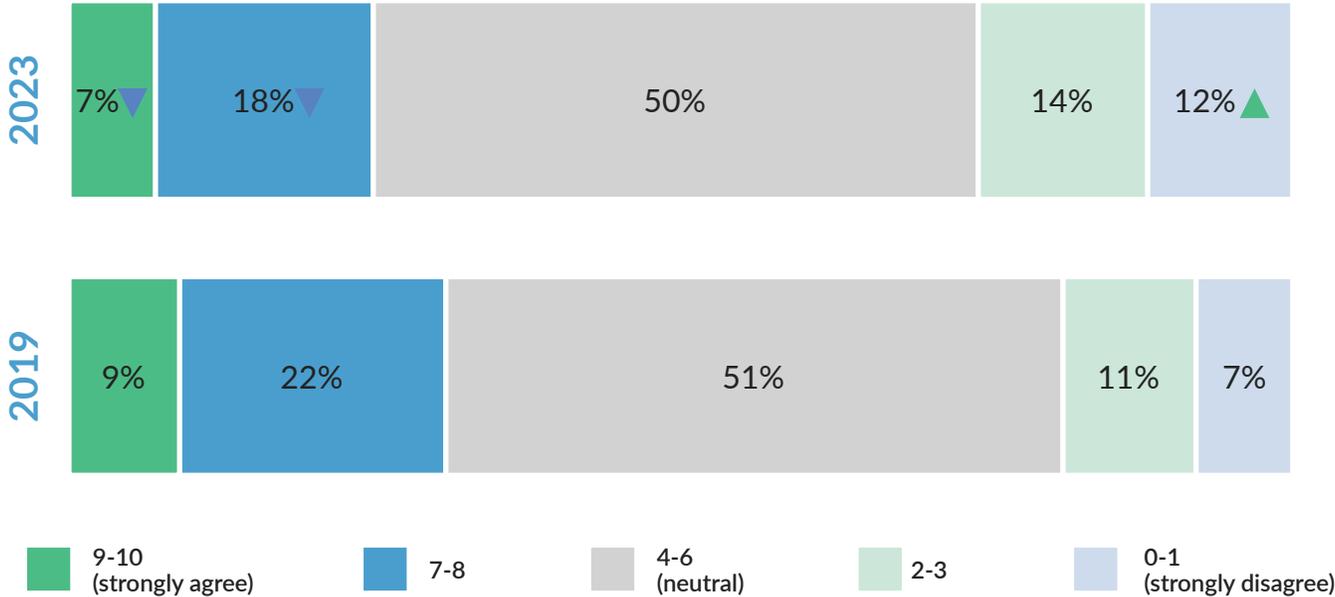


CANADIAN FOOD AFFORDABILITY COMPARED TO OTHERS

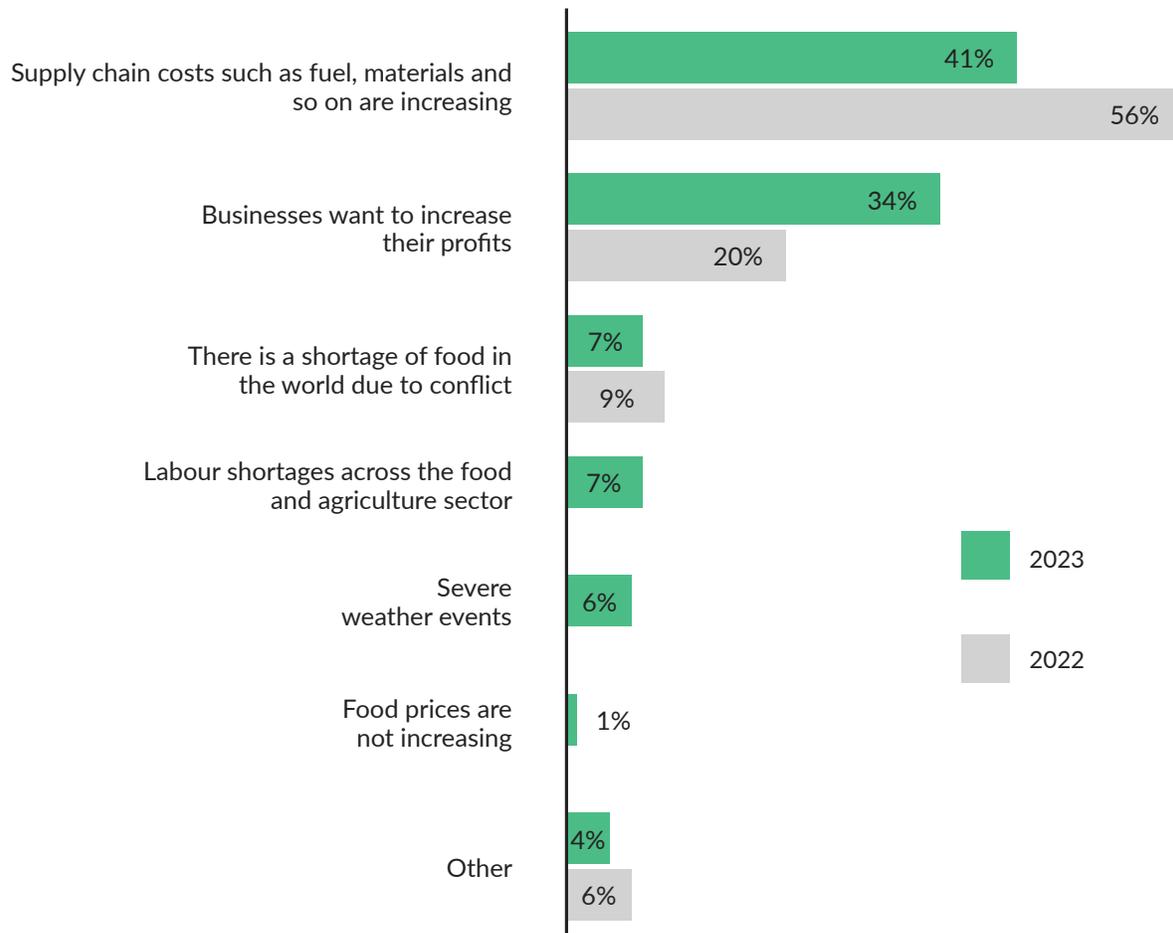
Given the growing level of concern related to the cost of food, it is unsurprising that only a quarter of Canadians feel like their food is the most affordable in the world – an opinion that has worsened significantly compared to 2019 (25% provided a rating of 8-10 vs 31%). Despite what may be empirically true, perceptions are reality among most Canadians who say they are faced with food costs that have been on the rise.



“CANADIAN FOOD IS AMONGST THE MOST AFFORDABLE IN THE WORLD TODAY”



THE COST OF FOOD IS RISING BECAUSE...

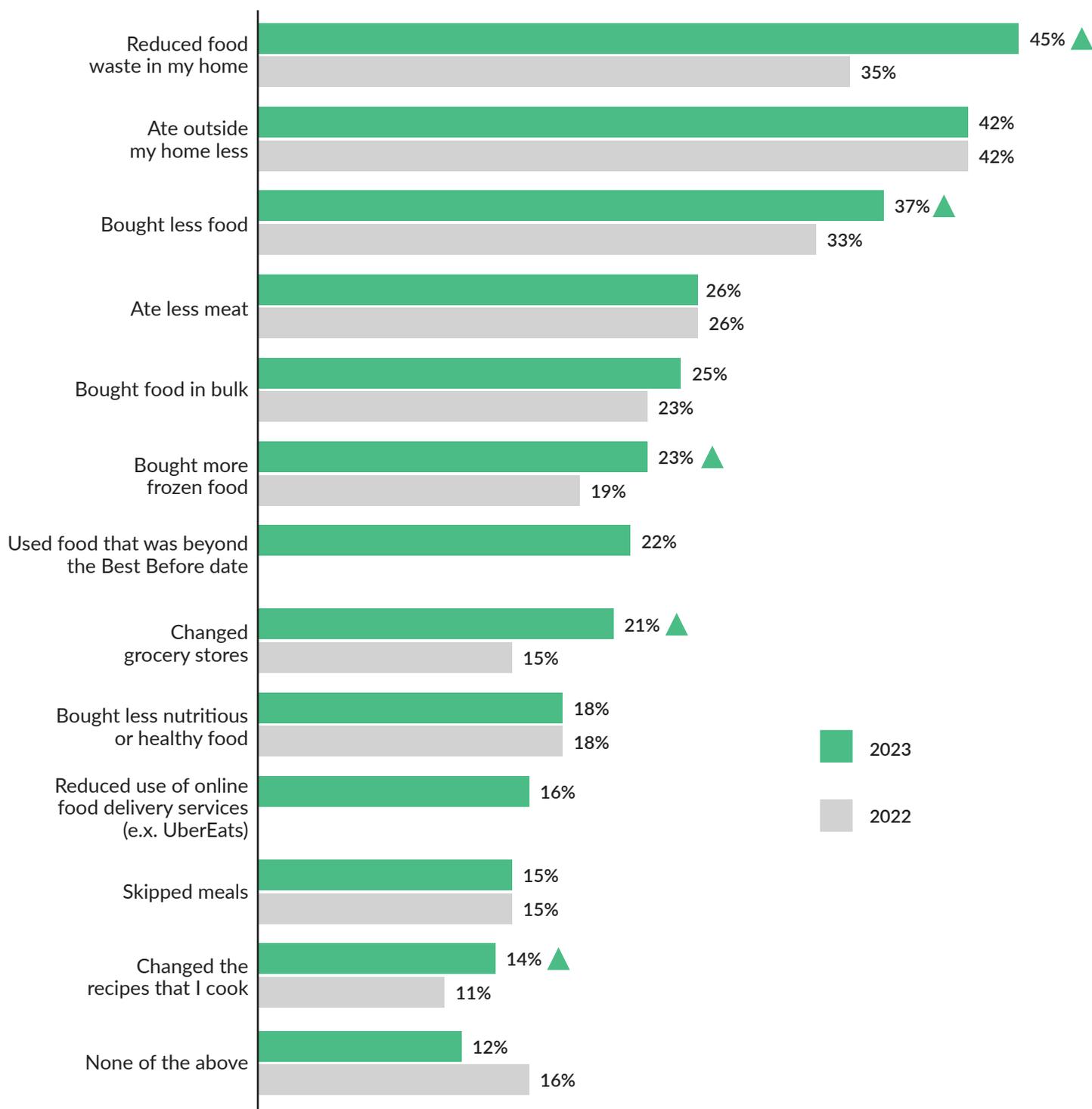


Food prices are rising according to 99% of Canadians* and supply chain issues remain the top reason Canadians cite (41%) for the increase. Compared to last year, there is an increasing view that businesses prioritizing profit is to blame for the current cost of food (34% vs 20%). Perceptions aside, Canadians are adapting their consumer behaviours when it comes to buying food.

*CCFI 2023 Public Trust Research



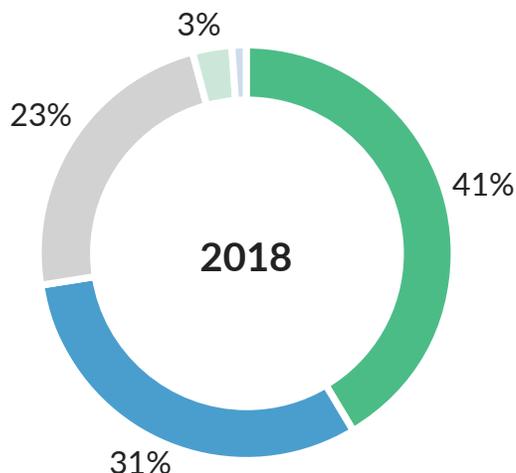
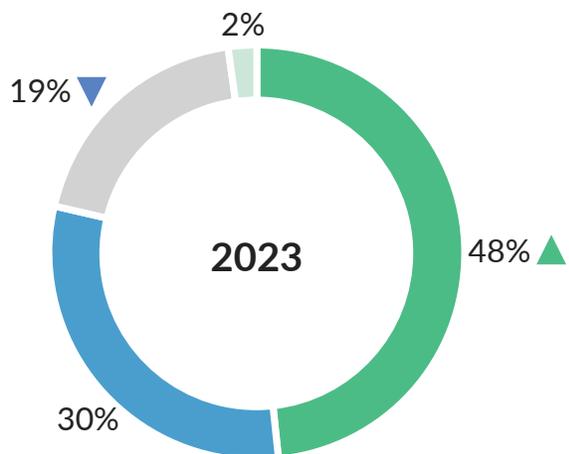
CANADIAN'S RESPONSE TO FOOD PRICES



Nearly half of Canadians say that in response to food prices, they have reduced food waste in their household – a focus that has increased a significant ten points compared to 2022 (45% vs 35%). Unchanged from last year, about four in ten say they are eating outside of their home less (42%). Since last year, Canadians are more likely to say they are buying less food, buying more frozen food, changed grocery stores, and have adapted the recipes they cook.

HOUSEHOLD FOOD WASTE: A FIVE-YEAR CHECK-IN

“I MAKE EVERY EFFORT TO REDUCE THE AMOUNT OF FOOD I THROW AWAY”



Note: Values less than 2% not labelled



Canadians are increasingly serious about food waste; half say they strongly agree with the statement, “I make every effort to reduce the amount of food I throw away”; 48% provided a rating of 9-10 out of 10 which is a significant seven point higher compared to 2018.





BEYOND THE NUMBERS

Actionable Next Steps

Canadians are adapting, support them on the journey.

While no one person or stakeholder controls the cost of food, each person can control what food they buy and eat.



BEYOND THE NUMBERS

Actionable Next Steps

CCFI's tracking research illustrates acute consumer shifts you can respond to.

Applaud Canadians for their efforts to reduce food waste at home and provide information on how to best store food to prevent spoilage. Support shifts to frozen options by re-assuring consumers about freshness and nutrition. Provide recipes using simple, cost-effective ingredients.



SUSTAINABILITY

CLIMATE CHANGE AND SUSTAINABILITY – A BACK-BURNER ISSUE

Concern about climate change is unchanged compared to last year – a third of Canadians say they are very concerned about this issue (34% provided a rating of 9-10 out of 10). The daily pocketbook pressures of the cost of food, inflation, healthcare, and housing outrank environmental issues, and yet, climate change remains a top-ten concern and is ranked 7th out of 22 issues. More specific issues like environmental sustainability in farming falls even further down the list of everyday concern among Canadians; about one in five are very concerned (22%) and is ranked 20th.



BEYOND THE NUMBERS Actionable Next Steps

Tackling sustainability challenges must be sector-led. Given the ‘backburner’ level of concern regarding climate change and environmental sustainability, the food and agriculture system should not wait for consumer demand for action but rather work to communicate the many existing practices that ensure the long-term sustainability of the industry.



PERCEPTIONS OF SUSTAINABILITY PRACTICES

How the Canadian food system addresses sustainability challenges

FARMERS ADOPT SUSTAINABLE PRACTICES



Precision farming to optimize resource use & reduce fertilizer and pesticide use



Crop rotation and cover crops to improve soil health.



Minimum tillage practices to reduce GHG emissions and increase carbon sequestration

FOOD PROCESSORS REDUCE THEIR ENVIRONMENTAL IMPACT



Practices and technologies to minimize food waste during production and distribution



Reducing energy consumption by using energy-efficient technologies and equipment



Exploring sustainable packaging options and reducing the use of single-use plastics

FOOD RETAILERS IMPROVE INVENTORY MANAGEMENT



Improving inventory management to reduce food waste



Donating surplus to food banks



Reducing packaging waste by using compostable or recyclable materials

It's GOOD
CANADA

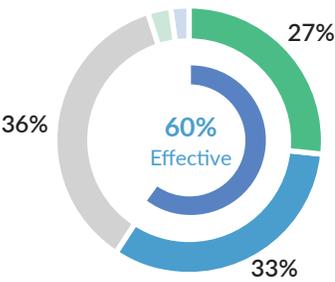
Canada's food and agriculture system is at the forefront in adopting increasingly sustainable practices. CCFI's public-facing resource, It's Good Canada (<https://itsgoodcanada.ca/>), provides Canadians with balanced food system information about the issues they care about.

This year's research utilized the "How the Canadian Food System Addresses Sustainability" infographic as a frame of reference to measure how effective or not Canadians feel these practices are in making a positive impact on the environment.

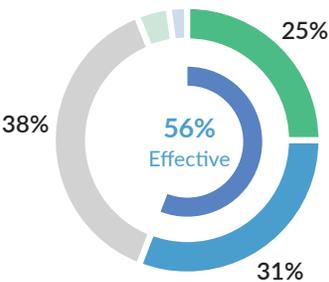
Source: <https://itsgoodcanada.ca/food-system-insights/>

FARMING PRACTICES

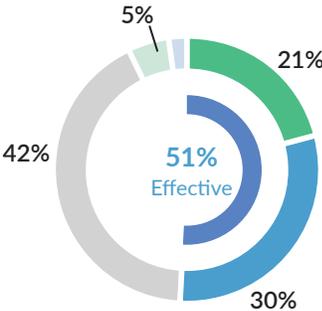
Crop rotation and cover crops to improve soil health



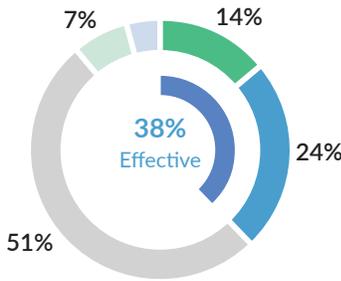
Automated irrigation systems that reduces water waste and improves crop yields



Precision farming to optimize resources and reduce fertilizer and pesticide use



Minimum tillage practices to reduce GHG emissions and increase carbon sequestration

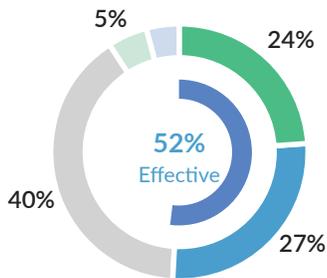


*Effective is 7-10 out of 10

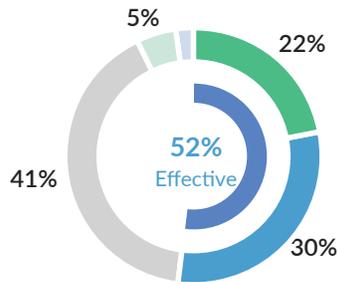


FOOD PROCESSING

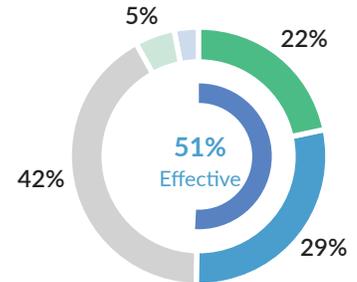
Exploring sustainable packaging options and reducing the use of single-use plastics



Practices and technologies to minimize food waste during production and distribution

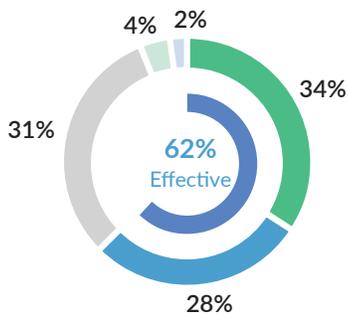


Reducing energy consumption by using energy-efficient technologies and equipment

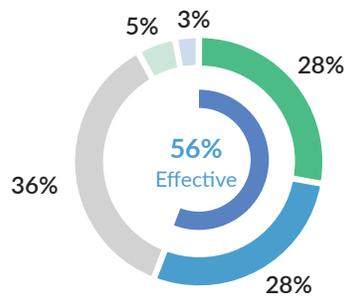


FOOD RETAIL

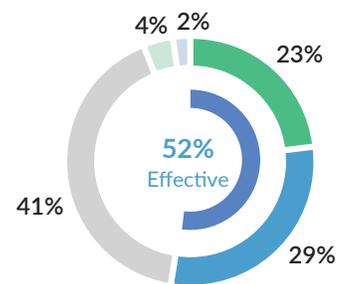
Donating surplus to food banks



Reducing packaging waste by using compostable or recyclable materials



Improving inventory management to reduce food waste



Note: Values less than 3% not labelled
*Effective is 7-10 out of 10

THE MOST EFFECTIVE SUSTAINABILITY PRACTICES, AS IDENTIFIED BY CANADIANS ARE:



Donating surplus food to food banks.



Crop rotation and cover crops to improve soil health.



Reducing packaging waste by using compostable or recyclable material.



Automated irrigation systems that reduce water waste and improves crop yields.



BEYOND THE NUMBERS Actionable Next Steps

Minimum tillage – improved awareness required.

The lowest rated sustainability practice tested was “minimum tillage practices to reduce GHG emissions and increase carbon sequestration” with only 38% feeling it to be effective (rating of 7-10 out of 10). Encouragingly, very few feel this to be an ineffective approach, but rather, most fall within the ‘neutral middle’ rating of 4-6. Improved communication and raising awareness of the practice and its benefits is required. Link it to other well-viewed benefits such as soil health and water use.



THE CANADIAN CONSUMER

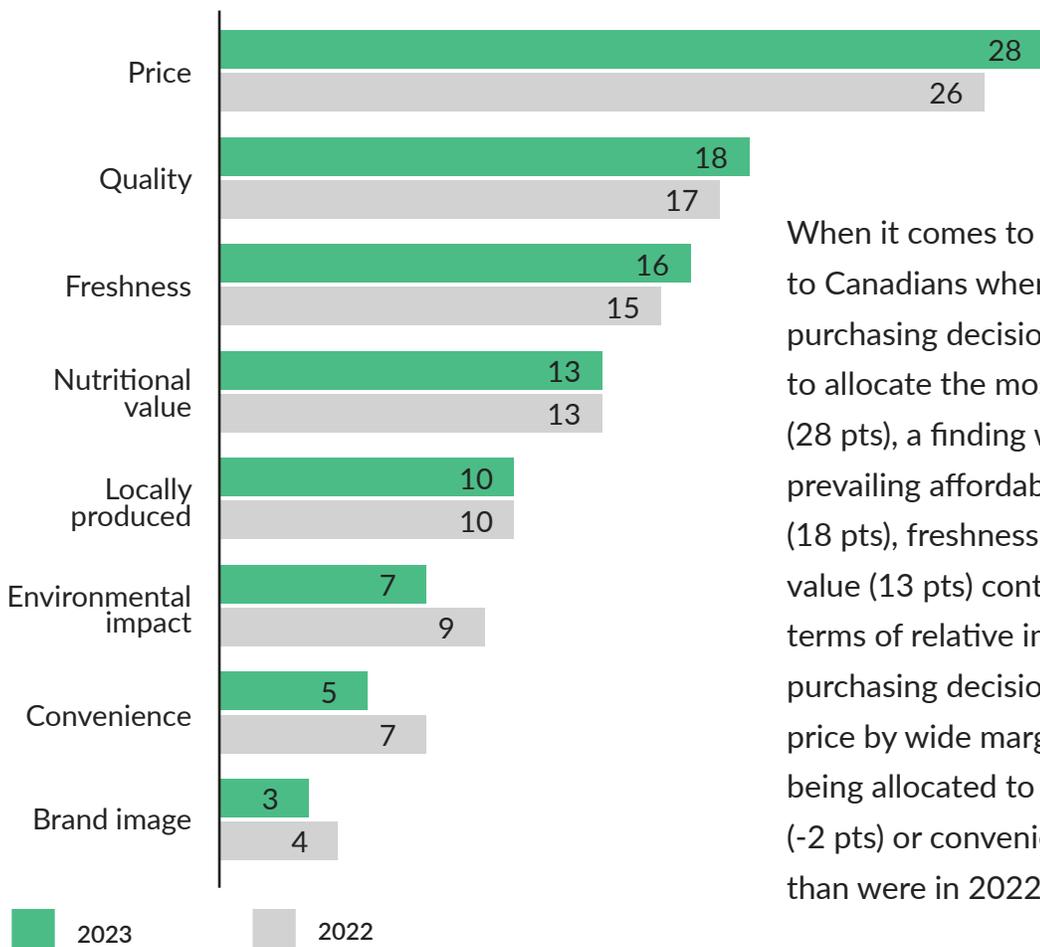
THE CONSUMER MINDSET

The average Canadian might not understand the complexities of the food chain, know the difference between free range and pasture raised eggs, or have ever been to a farm, yet they remain an important part of the food system. Food choices can be a very personal topic; in better understanding the motivations behind what people chose to eat and why, this research moves beyond the Canadian citizen to consumer.



FOOD PURCHASING MOTIVATIONS

If you had 100 points to allocate based on the level of importance you place on various factors pertaining to your food purchasing decisions, how would you allocate these points to each of the following?



When it comes to what is most important to Canadians when making food purchasing decisions, Canadians continue to allocate the most importance to price (28 pts), a finding which underscores prevailing affordability concerns. Quality (18 pts), freshness (16 pts), and nutritional value (13 pts) continue to rank higher, in terms of relative importance regarding food purchasing decisions, though these all-trail price by wide margins. Fewer points are being allocated to environmental impact (-2 pts) or convenience (-2 pts), on average, than were in 2022.



THE SUSTAINABLE CONSUMER

ASSESSING SUSTAINABILITY

Canadians most commonly associate sustainable food with its impact on the environment (38%) followed at a distance by food safety and being grown/raised locally.

Food Grown/Raised Sustainably...



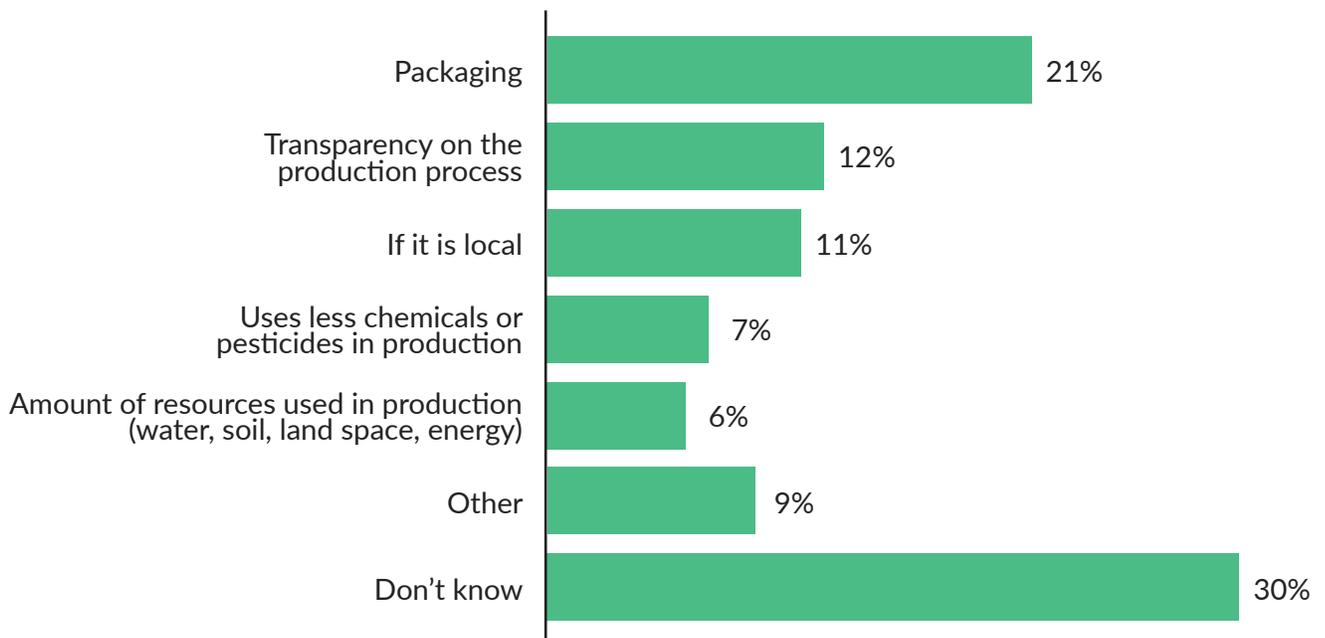


IDENTIFYING ENVIRONMENTAL IMPACT

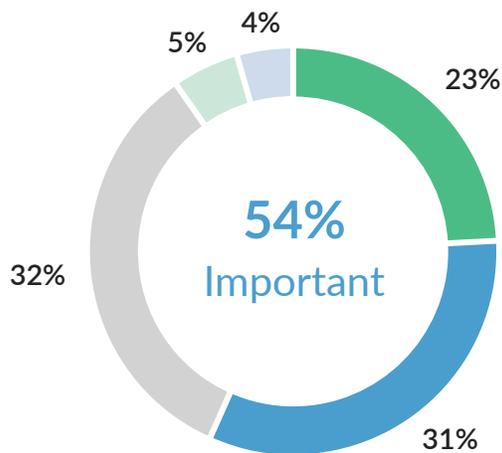
Uncertainty abounds in terms of determining environmental impact of food items.

Among those who feel a food item's impact on the environment best demonstrates its sustainability, three in ten say they do not know how to make this assessment. Packaging is the most common tangible indicator of environmental impact, cited by one in five.

How do you tell whether a food item has a positive impact on climate change and the environment?



IMPORTANCE OF SUSTAINABILITY LABELLING



9-10
(very important)

7-8

4-6
(moderately important)

2-3

0-1 (not important)



There is significant support for having standardized sustainability labels on food products. A majority (54%) thinks having third-party, verified, standardized sustainability labels on food products is important (7-10 on 10-pt scale), with as many as one in four (23%) indicating that they feel this is very important (9-10 on 10-pt scale). At a minimum, the vast majority (85%) perceive this as being at least moderately important (5-10 on 10-pt scale).

Very few dismiss the importance of having third-party, verified, standardized sustainability labels – just four percent (4%) rate this as being not at all important (0-2 on 10-pt scale).



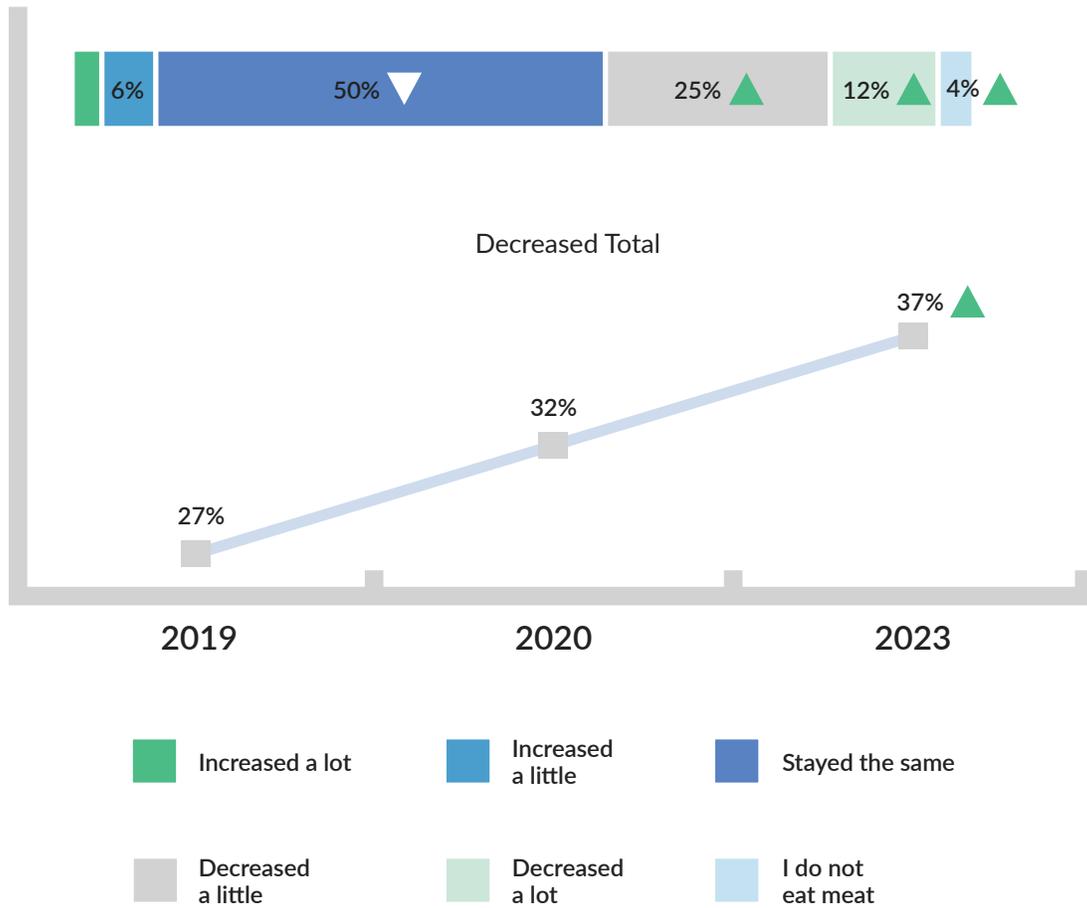
BEYOND THE NUMBERS Actionable Next Steps

Price trumps labels.

Although there is support for standardized sustainability labelling, do not underestimate the importance of cost of food for Canadians. Consumer demand for a “certified sustainable” food item will depend on the price. While some of the most eco-conscious consumer may accept a premium for sustainability, most Canadians remain extremely price sensitive.

MEAT CONSUMPTION HABITS

Over the past year, has the amount of meat you eat...



Canadians are eating significantly less meat than they have in the past. Nearly four in ten say that over the past year, the amount of meat they eat has decreased (37%) – a significant five points higher than 2020 and ten points higher compared to the 27% of Canadians who said their meat consumption had decreased in 2019.

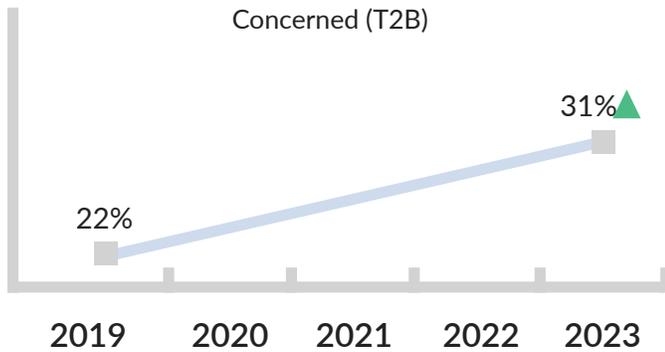
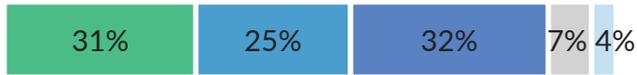


**PLANTS
AND ANIMALS**

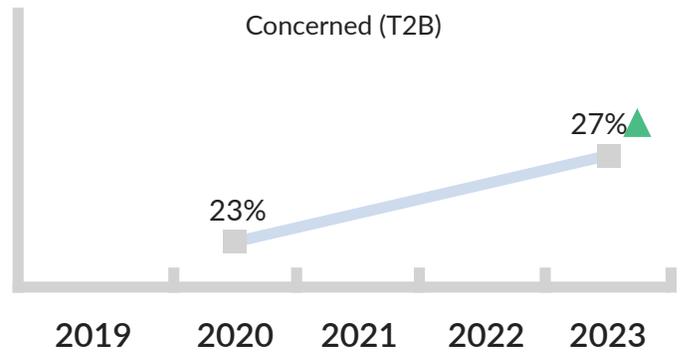
FOOD PRODUCTION PERCEPTIONS AND PREFERENCES

ANIMAL AGRICULTURE – CONCERNS

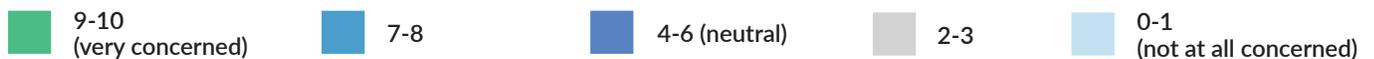
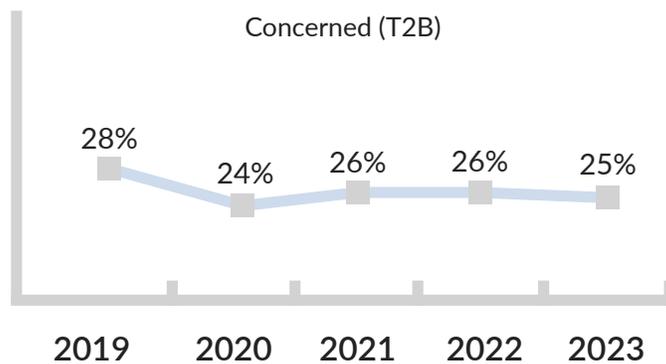
Drug residues in meat, milk, and eggs



Drug resistance due to farm animals being given antibiotics



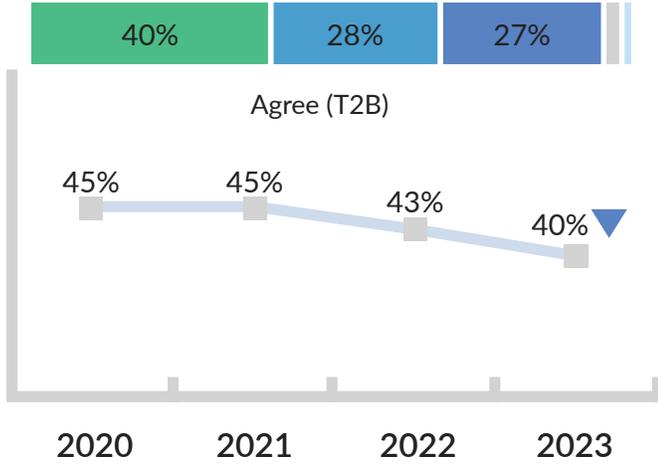
Humane treatment of farm animals



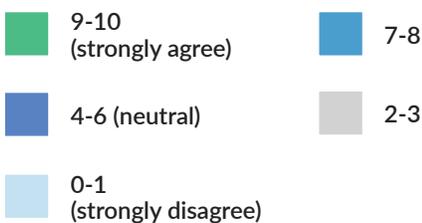
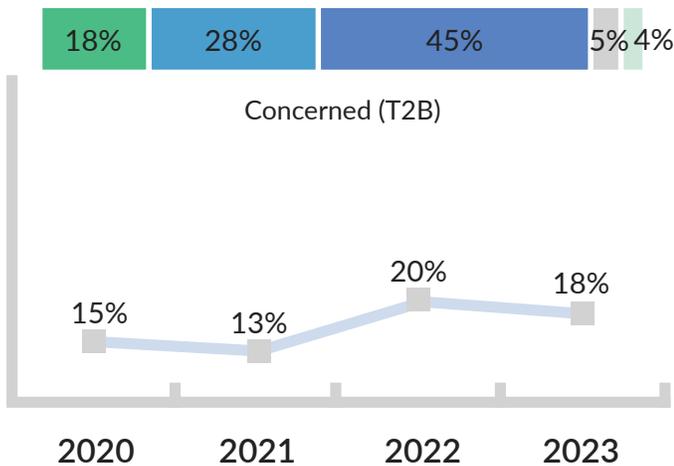
Overall concern about the humane treatment of farm animals has remained consistent over the last four years with a quarter of Canadians saying they are very concerned about this issue. The remaining areas of animal agriculture are of greater and growing concern. Three in ten are very concerned about drug residues in meat, milk, and eggs, up a significant nine points since 2019. Concern about antibiotic drug resistance in farm animals has risen a significant four points, with 27% saying they are worried about this.

ANIMAL AGRICULTURE – PERCEPTIONS

If farm animals are treated decently and humanely, I have no problem consuming meat, milk and eggs



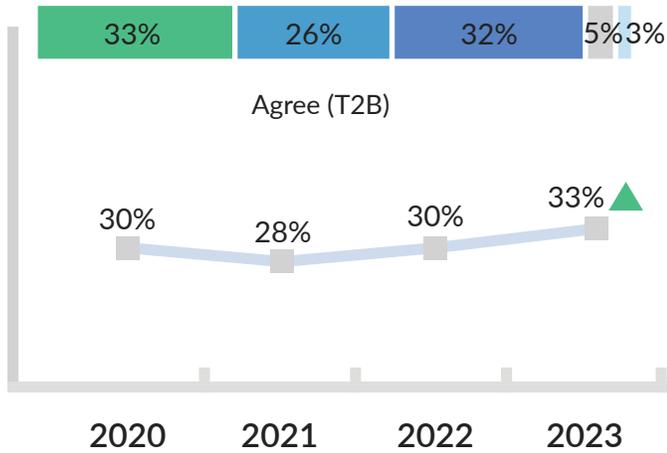
Canadian meat, milk and eggs are derived from humanely treated animals



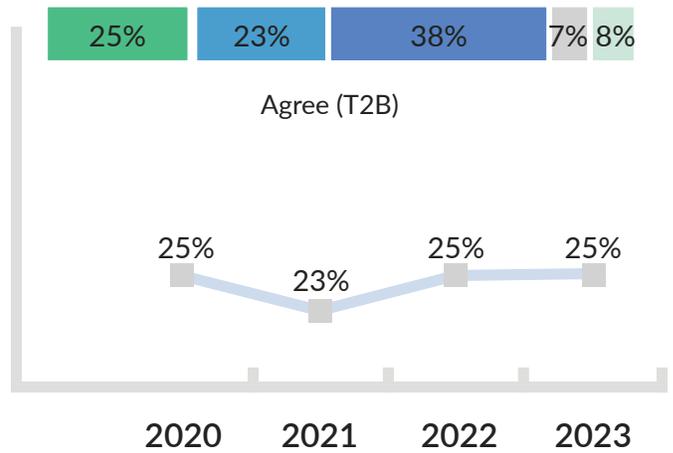
Four in ten Canadians agree that if farm animals are treated humanely, they have no problem consuming meat, milk and eggs, a sentiment that has weakened since last year (40% vs 43%). The 2022 tracking-high agreement that Canadian meat, milk, and eggs are derived from humanely treated animals has been maintained with about one in five strongly agreeing.

CROP PRODUCTION – CONCERNS

The use of pesticides in crop production



Eating food that comes from genetically engineered crops



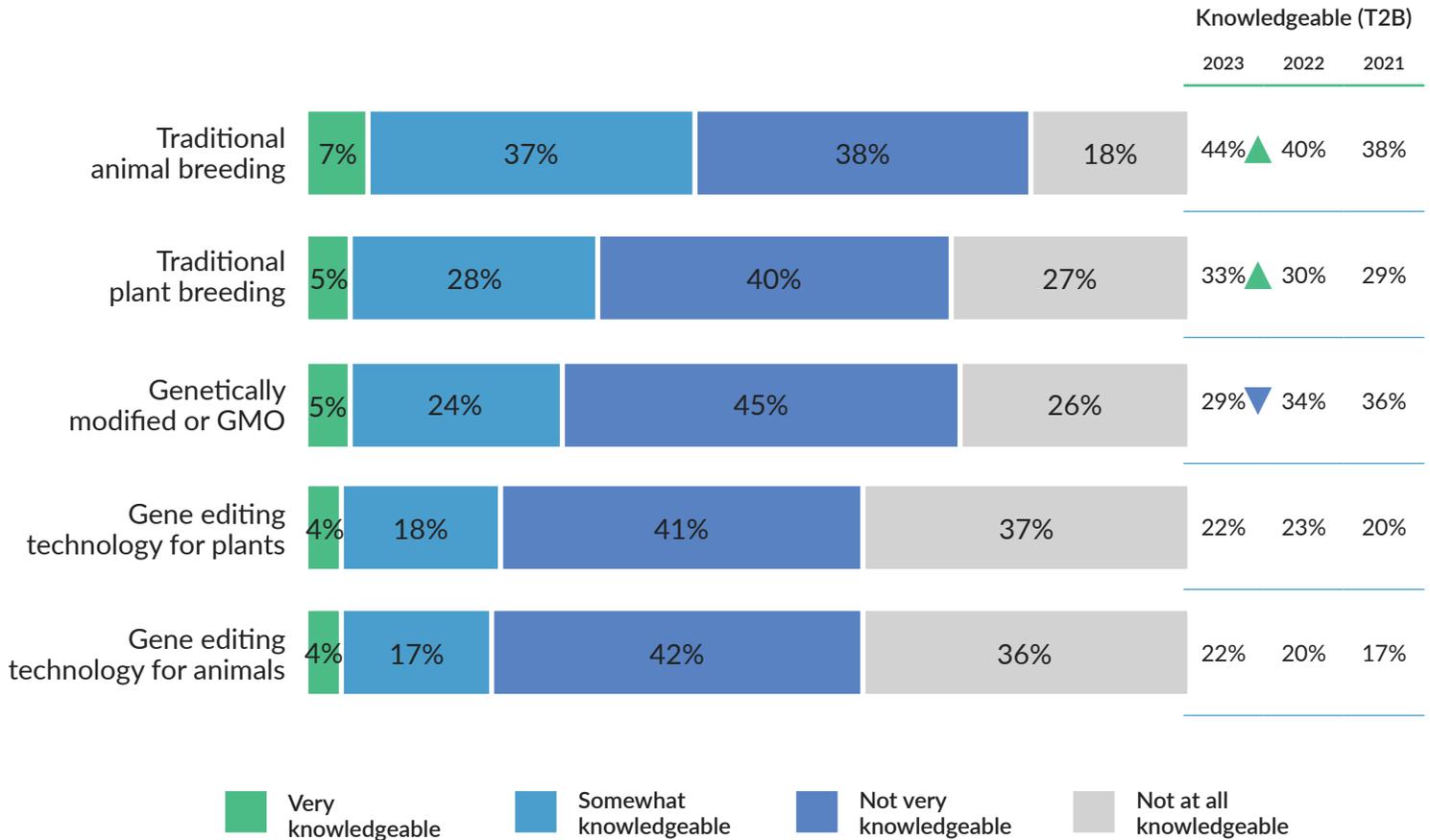
■ 9-10 (very concerned)
 ■ 7-8
 ■ 4-6 (neutral)
 ■ 2-3
 ■ 0-1 (not at all concerned)



Canadians are increasingly concerned about the use of pesticides in crop production; a third say they are very concerned, up a significant three points compared to last year. A quarter say they are worried about eating food that comes from genetically engineered crops, a level of concern that has remained consistent over the last four years.

WHAT DO CANADIANS KNOW AND HOW DO THEY FEEL?

KNOWLEDGE OF BREEDING AND GENE EDITING

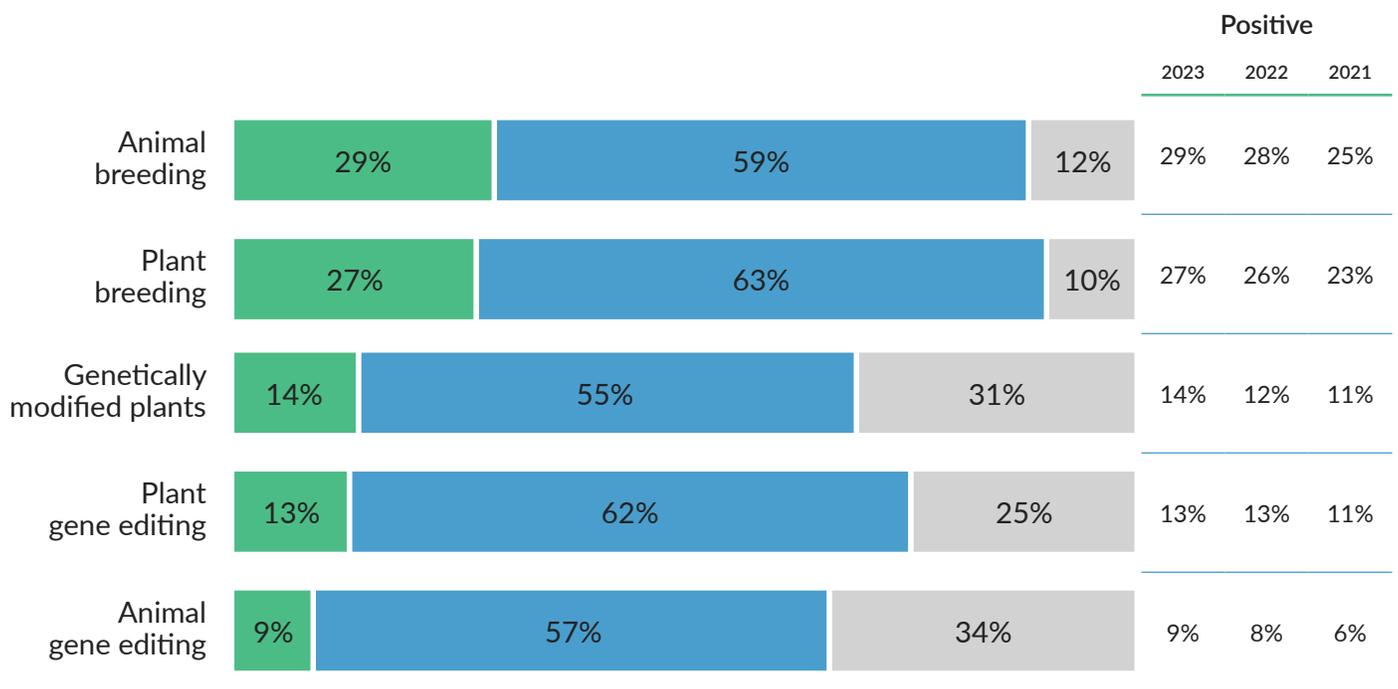


Traditional animal and plant breeding are the areas Canadians say they are most knowledgeable about and these knowledge levels have increased significantly compared to last year. Fewer say they are knowledgeable about GMOs compared to 2022 three in ten say they are at least somewhat knowledgeable, down a significant five points. Gene editing remains the least understood technology with most Canadians saying they are not knowledgeable about either plant or animal gene editing.





PLANT AND ANIMAL TECHNOLOGY



■ Positive
 ■ Neutral
 ■ Negative



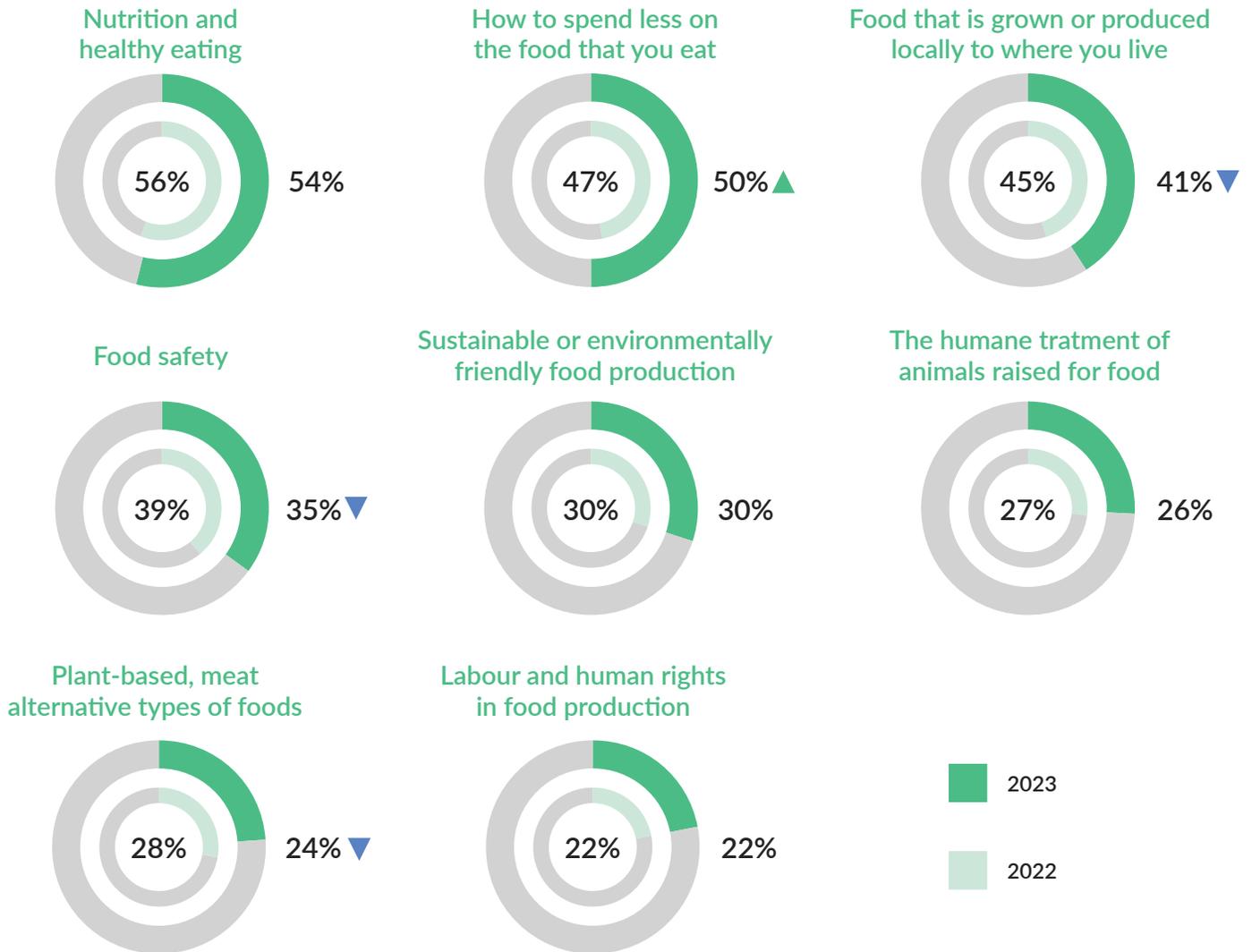
Impressions mirror knowledge in terms of the ranking of the plant and animal technologies. Most Canadians are neutral towards all areas although more feel negatively than positively about genetically modified plants and gene editing in both plants and animals.



MEDIA AND COMMUNICATIONS

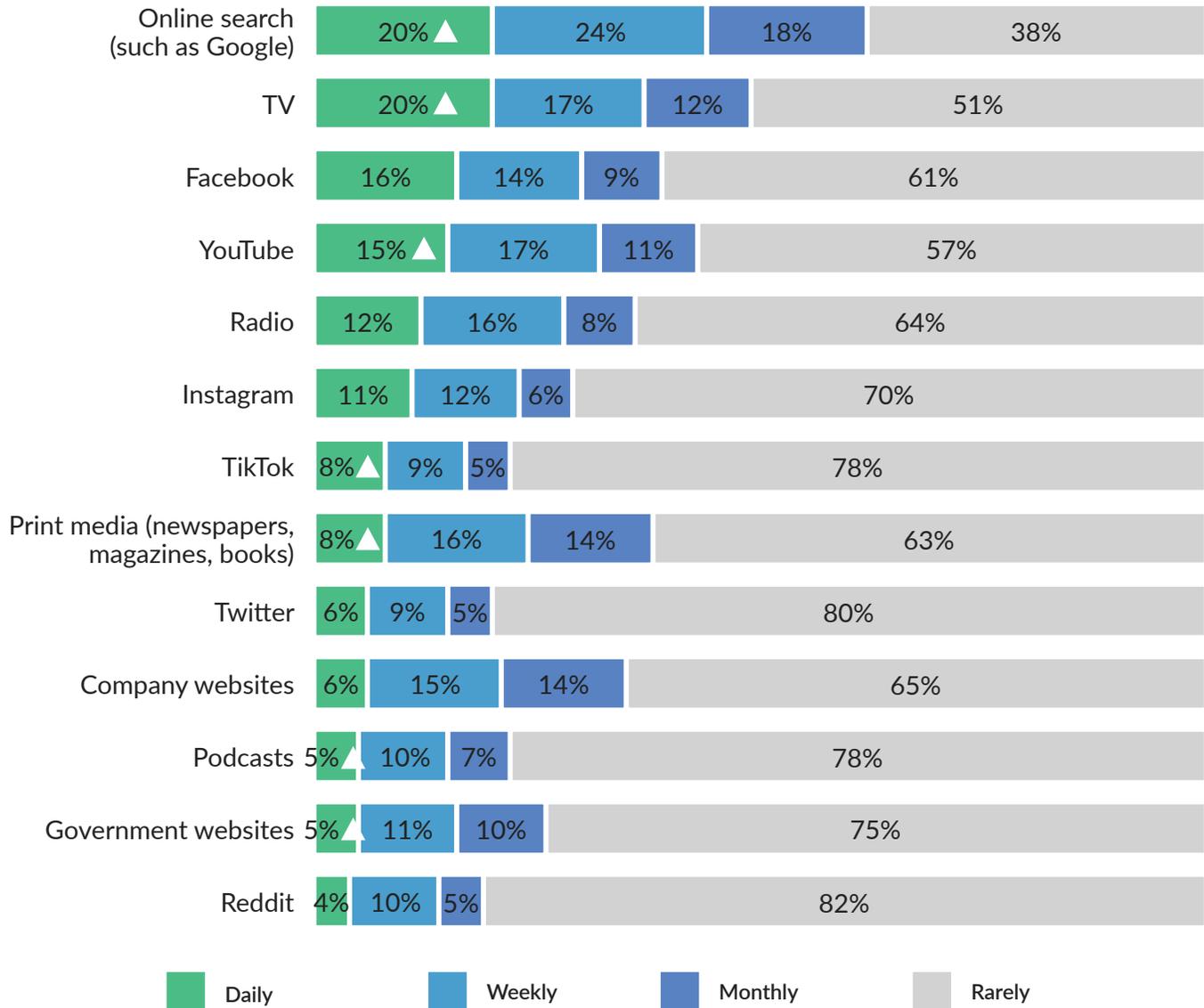
WHAT ARE CANADIANS INTERESTED IN?

Canadians continue to say nutrition and healthy eating is the top area they seek information, unchanged from last year. Significantly more say that in the last six months, they have sought out information on how to spend less on food. Compared to last year, fewer are engaging with the topics of local food, food safety, and plant-based meat alternatives.



Healthy can be affordable. Help Canadians understand that healthy food doesn't have to break the bank. Highlight simple ingredients, teach Canadians about more affordable seasonal options, and that frozen food is just as nutritious as fresh. Health is the ultimate wealth for Canadians; help them understand that the food you provide them can be both healthy and affordable.

WHERE ARE CANADIANS LOOKING?



Canadians are increasingly engaging with most sources for information about food. About one in five say they turn to online searches, TV, and Facebook daily. Compared to last year, significantly more say they use online searches, TV, YouTube, TikTok, print media, podcasts, and government websites daily.

WHAT'S TRUSTED?

Trusted sources matter more than trusted brands, people, or even loved ones.

More than twice as many Canadians indicate say they would know if information were communicated about food is truthful if it includes facts from a source they trust (62%) than if it was communicated by a trusted person (30%), brand (28%), or loved one (19%).

INFORMATION ABOUT FOOD IS TRUTHFUL IF IT...

Includes facts from a source that I trust

62%

Is communicated by a person I trust

30%

Is communicated from a brand I can trust

28%

The number of times I read, see, or hear it.

25%

Is communicated to me by family and friends

19%





ACKNOWLEDGEMENTS

CCFI RESEARCH ADVISORY PANEL

A sincere thanks to CCFI's Research Advisory Panel members for sharing their time, insights and expertise that have shaped the 2023 Public Trust Research and beyond.

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OUR APPRECIATION

The Canadian Food for Integrity benefits from a strong and engaged Board of Directors. Unique in experience, perspectives, and geography, CCFI's mission is continually served through the board's guidance. Thank you to all board members for their support to pursue data-driven public trust efforts.