

2018 PUBLIC TRUST RESEARCH

Insights to Actions



WHAT MAKES FOOD INFORMATION CREDIBLE?



THE CANADIAN CENTRE FOR
FOOD INTEGRITY

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

CCFI was launched in Canada in June 2016 as a program and in April 2017 became its own distinct organization. In these early stages of development, many milestones have been achieved – the first being diverse leadership and investment from across Canada's food system. A solid foundation has been created, with many opportunities for growth and collaboration.



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

JOIN. INVEST. DONATE.

www.foodintegrity.ca
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A man with a beard and a woman with glasses are smiling and cooking together in a kitchen. The man is wearing a striped shirt and the woman is wearing a green patterned shirt and a white apron. They are both holding a bundle of spaghetti. The man is pouring something from a blue bowl into a white pot. The woman is holding the spaghetti over a white pot. The background shows a kitchen with shelves and jars.

THE 2018 RESEARCH

THE 2018 RESEARCH

The 2018 CCFI Public Trust Research is a unique combination of building on trend and benchmark data, responding to emerging food system issues and using innovative methodologies to find new insights that inform efforts to earn trust more effectively. This year, CCFI conducted two complementary studies: our traditional public trust research and digital ethnography. They include data from both Canada and the U.S. for unique and valuable North American comparison.

1. Public Trust Tracking: Key Food System Issues with a Spotlight on Food Loss and Waste

The 2018 web-based survey was completed from July 13-19 by 1,509 respondents who reflect the general Canadian consumer population aged 18 or older.

Objectives

- To gauge and track public attitudes about Canadian food, agriculture and food system issues, with comparison to U.S. CFI data
- Develop a baseline of public attitudes and behaviours regarding food loss and waste in Canada

The information in this report is a summary of the 2018 research, which is meant to be broadly shared. CCFI members have access to the full comprehensive results and customized insights. Contact CCFI directly to book a presentation or find out more.

We welcome your input and ideas for future areas of study as this work is meant to help Canada's food system earn trust.

2. Digital Ethnography: What Makes Food Information Credible in Canada?

Ethnography to study consumer behaviour is not new - typically studying small groups of individuals' behaviours directly. Digital ethnography is new because of the scale of data and sample size, collecting the data online, and analysis into values-based archetypes instead of traditional segmentation.

The CCFI digital ethnography study examined the online behaviour of 9,200 Canadians aged 18-74 over a 25-month period from July 2016 to August 2018.

Objectives

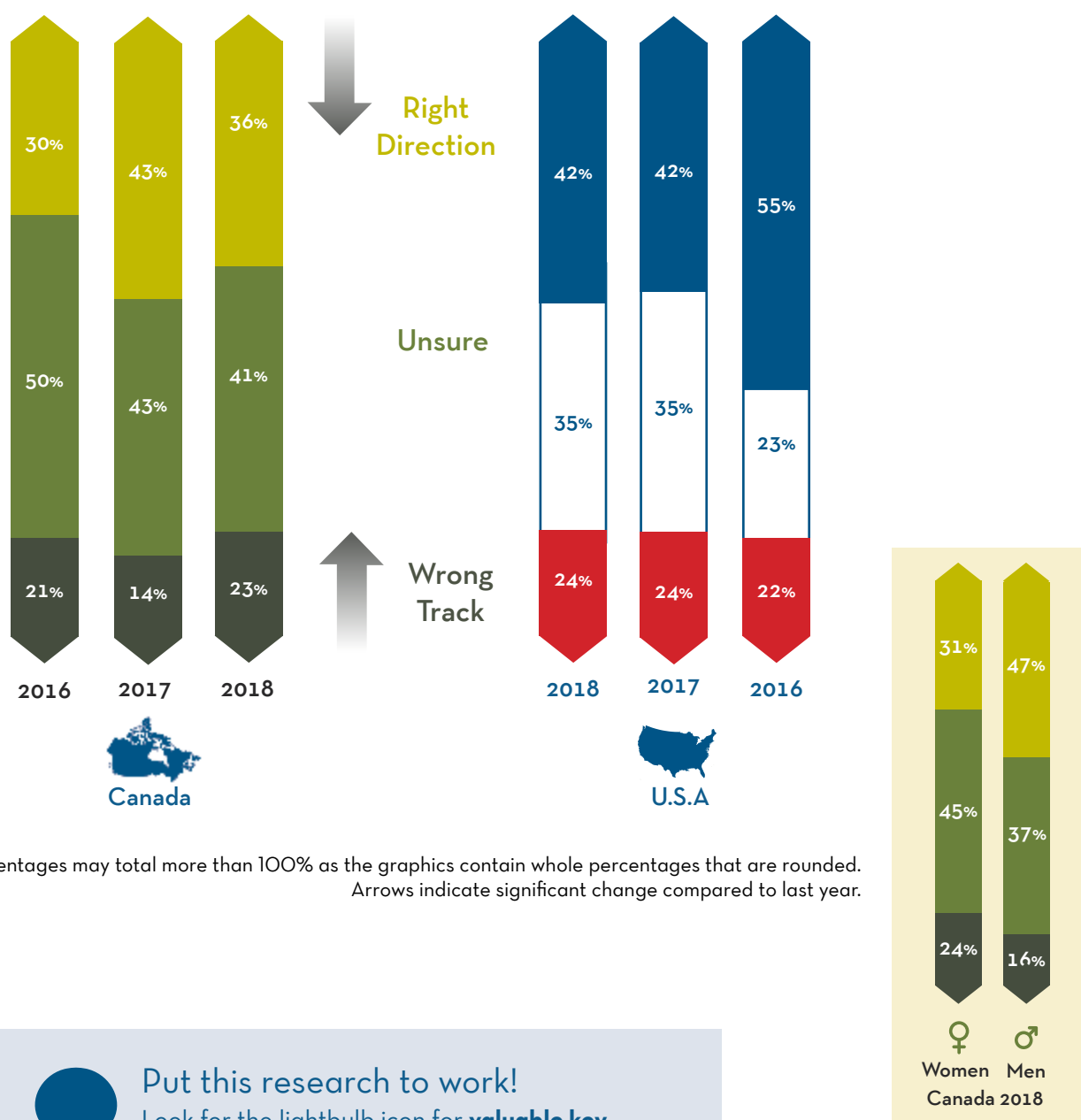
- Provide insight into what makes food information credible
- Identify key consumer archetypes based on values, motivations, share of voice and influence
- Develop specific strategies to engage and increase trust with targeted segments
- Compare and contrast to the U.S. CFI digital ethnography study findings from 2017

A top-down view of a wooden table set for breakfast. The table is cluttered with various food items: a plate of croissants, a bowl of blueberries, a cup of coffee, a glass of orange juice, a plate of cereal, a plate of fruit (grapes and peaches), a plate of salami and cheese, and a plate of pancakes. Several people's hands are visible, interacting with the food and a smartphone. The text "IS THE FOOD SYSTEM HEADED IN THE RIGHT DIRECTION?" is overlaid in the center of the image.

IS THE FOOD SYSTEM
HEADED IN THE RIGHT
DIRECTION?

DIRECTION OF THE FOOD SYSTEM

After a significant increase last year, survey results show a **significant decrease** in the number of consumers who feel the food system is headed in the right direction – one-third (36%) compared to more than four in ten (43%) in 2017. The proportion of Canadians who believe the food system is on the wrong track has increased significantly and is back to levels found in 2016.



Put this research to work!
Look for the lightbulb icon for **valuable key insights** related to the research and how to apply them in your efforts.

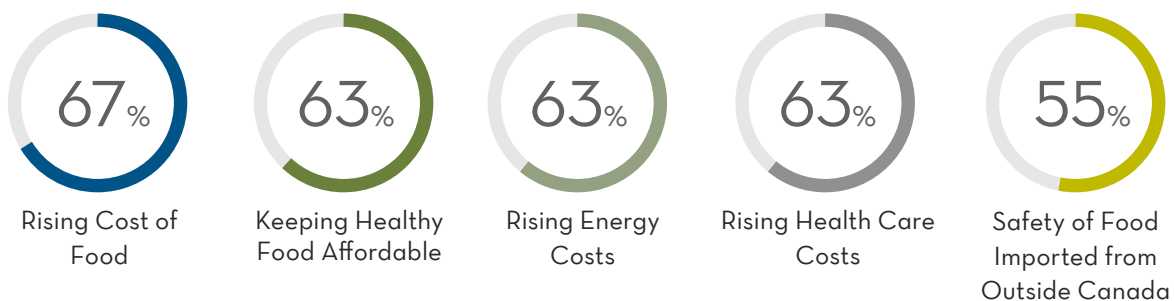


It is important to note segment differences, as fundamental as gender.

PUTTING LIFE ISSUES IN PERSPECTIVE

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

The rising cost of food maintained the top position for the third year in a row, at 67% (up from 62% in 2017). “Keeping healthy food affordable” (61% in 2017) ranks second, but is also tied with the cost of health care (up 9 points) and energy (up 5 points).



The rising cost of food and keeping healthy food affordable are top priorities for all Canadians for three years in a row. This is valuable information for all food system stakeholders when it comes to engaging on topics that matter most to consumers. What are you doing that helps contribute to healthy, affordable food for Canadians? Are you communicating your efforts?

MORE FOOD SYSTEM CONCERNS



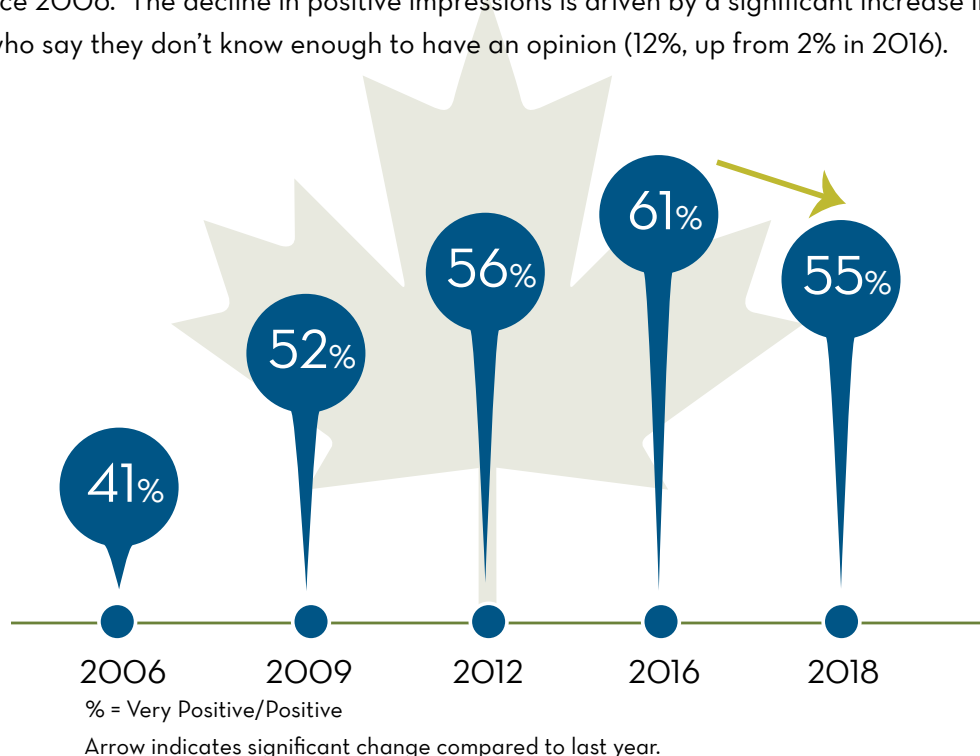
Consumer concern has increased across all life issues in 2018 compared to 2017.

Women were more concerned about all issues than men.

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

ATTITUDES ABOUT CANADIAN AGRICULTURE

The overall impression of agriculture in Canada today has decreased significantly after steady increases since 2006. The decline in positive impressions is driven by a significant increase in Canadians who say they don't know enough to have an opinion (12%, up from 2% in 2016).



The food system must turn up the volume on the good work being done to provide Canadians with balanced, credible information about Canadian agriculture.

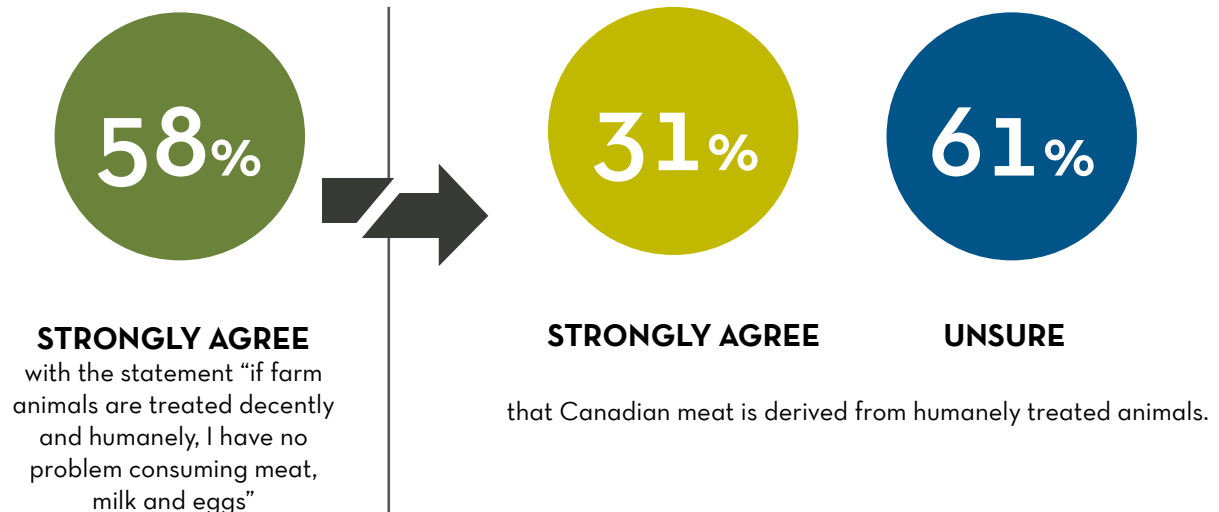
WHAT ABOUT THE WHY?

Knowing that perceptions of both the food system overall and Canadian agriculture specifically have declined this past year, you might be wondering – why? In the past we have asked Canadians follow-up questions on these issues, but we didn't this year. Our 2019 research will once again dig into what exactly is behind these ratings.

These questions are asked near the beginning of the study as a big picture “gut check” for food system stakeholders to gauge attitudes. Although perceptions have worsened compared to last year, a multi-year approach (either positive or negative) is needed before it's viewed as a trend. It is a good reminder of the CCFI mandate: “helping the food system **earn** trust.” Trust and public goodwill cannot be taken for granted and can erode without long-term engagement and effort.



PERCEPTIONS ON HUMANE TREATMENT OF ANIMALS IN CANADA - A DANGEROUS DISCONNECT

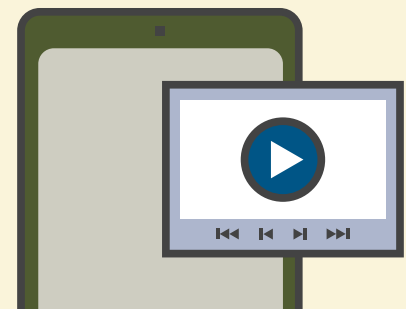


1. While six in ten Canadians agree they would consume meat, milk and eggs **IF** farm animals are treated humanely; less than one-third feel they **ARE** treated humanely.

2. Overall concern for humane treatment of animals is at 49%, up from 40% in 2017 and 43% in 2016.
3. Canadians are unsure whether “videos of farm animals being treated poorly are not representative of normal livestock farming.” Only one-third feel this is true (down a significant four points compared to 2017) while over half **56%** are unsure.



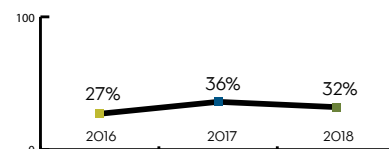
These three findings add up to a dangerous disconnect on one of our key food system issues that needs to be addressed. Over half our population is unsure about humane treatment of animals, leaving many opportunities to connect with shared values, credible voices and listening to concerns to address them most effectively.



“Videos of farm animals being treated poorly are not representative of normal livestock farming.”

Only one-third of Canadians strongly agree with this statement, a significant decrease since 2017.

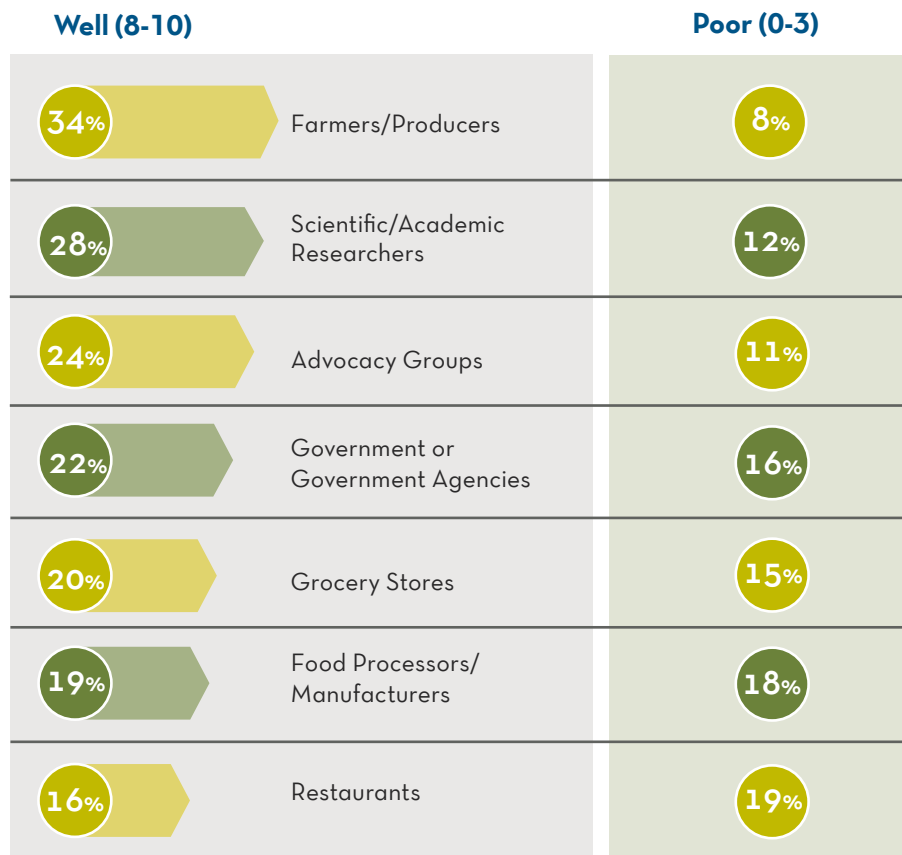
0-3	4-7	8-10
Low	Moderate	Strong
12%	56%	32%



TRANSPARENCY REPORT CARD

HOW IS THE FOOD SYSTEM DOING?

In 2017, CCFI research focused on transparency and what it takes to achieve it to increase trust. This year we asked Canadians how well each of the segments below are doing in providing OPEN and TRANSPARENT information about how their food is grown or produced so they can make informed food choices. Unfortunately, ratings across all groups are low, with 58% - 65% neutral.



This report card, along with the low ratings on the humane treatment of animals, illustrates a need to increase transparent communications with Canadians.



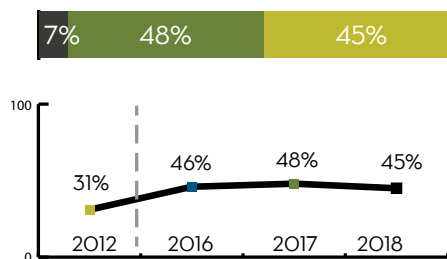
While there are many great efforts underway to be transparent and share the story of our food in Canada, the collective impact is not being perceived as enough or reaching consumers yet. Targeted efforts to specific audiences to increase share of voice with new approaches are needed to help improve this transparency report card in the future.

PUBLIC ATTITUDE TRACKING OVER TIME



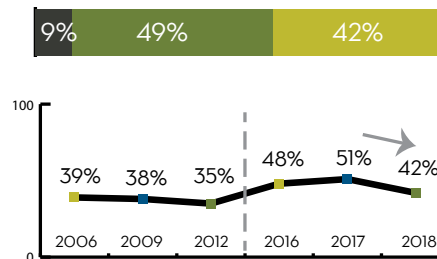
"I am personally concerned about the use of pesticides in crop production."

This is one of the highest rated statements and has remained consistent over the past three years.



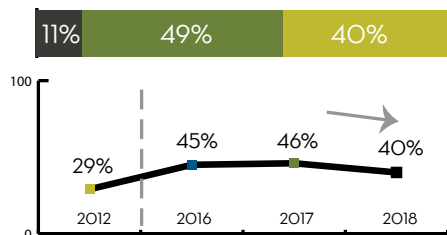
"I am personally concerned about the use of hormones in farm animals."

Concern on this issue has reached a three-year tracking low and is significantly lower compared to 2017.



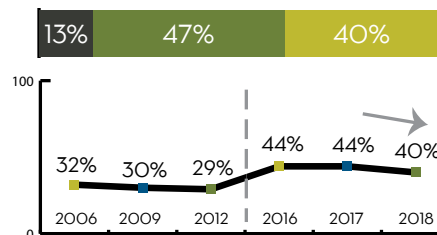
"I am personally concerned about drug residues in meat, milk and eggs."

Erosion of consumer concern is also seen on drug residues in meat, milk and eggs. The proportion of Canadians with a high level of concern has decreased significantly since last year.



"I am personally concerned about eating meat that comes from genetically engineered farm animals."

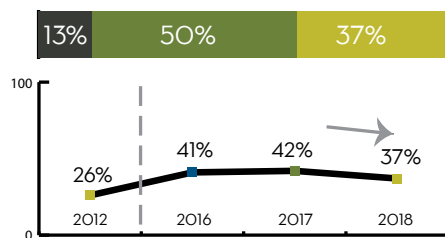
Only four in ten Canadians are very concerned about consuming genetically engineered farm animals - a tracking low.



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

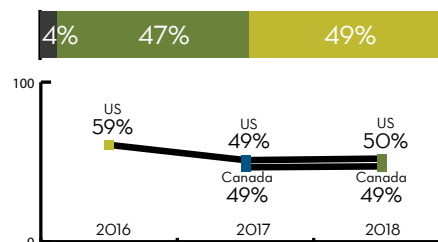
"I am personally concerned about eating food that comes from genetically engineered crops."

Public attitudes on this issue have decreased a significant 5 points since 2017.



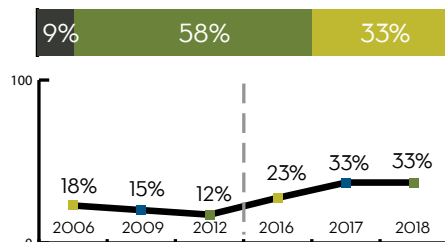
"I trust food produced in Canada/U.S. more than I trust food produced outside of Canada/U.S."

Canadians and those in the U.S. feel similarly on the topic of domestic food safety; half say they trust food produced in their respective countries more than food produced internationally.



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

Attitudes have levelled off after reaching a tracking low in 2016. One-third of Canadians trust in the government food inspection system to ensure the safety of food compared to less than a quarter in 2016.



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

topics over time. The commitment to public trust needs to be viewed as a long-term game plan and investment. It also provides valuable perspective on how issues compare to others and Canadians to Americans.

CCFI members have access to many more specific statements reflecting consumer attitudes toward food affordability and safety, farm animal welfare, sustainability, GMOs and antibiotics, as well as provincial and specific segment data. Contact us to become a member and access more detailed information and customized insights to help inform your public trust efforts.

2016-2018 trend numbers reflect the percentage of those who selected an 8-10 (strong agreement) rating from a scale of 0-10. 2006-2012 numbers reflect the percentage of those who selected "strongly agree" from a 5-point agreement scale. Arrows indicate significant changes compared to last year. Percentage may total more than 100% as graphs contain whole percentages that are rounded.

TACKLING FOOD LOSS AND WASTE IN CANADA

Food loss and waste has significant environmental, economic and social consequences. This waste leads to increased disposal costs, produces greenhouse gases throughout the food value chain, and **costs the Canadian economy up to \$100 billion annually**¹. Despite the large amount of food waste in Canada, there are still those struggling daily with food insecurity.

Studies show that consumers account for nearly half of all food waste², yet there is currently a surprising lack of publicly available research on Canadian attitudes and behaviours on this issue. This year, CCFI asked Canadians directly how they felt about this issue, where they fit into the problem, and what they thought could help them reduce their household's food waste.

Overall Concern About Food Loss and Waste*

49% are **concerned about food loss and waste in Canada**; this ranks 10th compared to other life issues (such as rising cost of food as number one at 67%)

When asked directly, only 39% agree that they are **“personally concerned about the amount of food loss and waste in Canada overall”**



Like many issues, all the key food system stakeholders are viewed as responsible when it comes to reducing food loss and waste. What is different than other issues? Consumers do hold themselves most responsible.

Responsibility for Reducing Food Loss and Waste in Canada*

69% Consumers like yourself

65% Restaurants

64% Grocery Stores

58% Food Processors/
Manufactures

50% Government

46% Farmers/
Producers

34% Advocacy
Groups

1 & 2 VCM-International (2014). “27 Billion” Revisited The Cost of Canada’s Annual Food Waste



Food Loss and Waste at Home*

- 58%** of Canadians make every effort to reduce the amount of food they throw away
- 42%** waste less food than a year ago
- 36%** of Canadians are concerned about food loss and waste in their own home

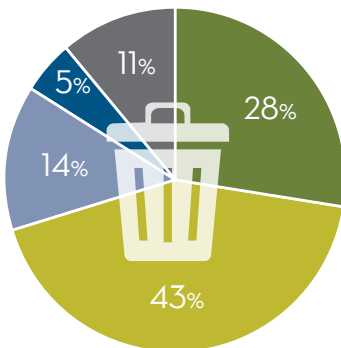


Main Causes of Household Food Loss and Waste

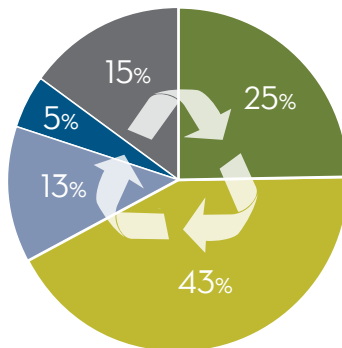
1. Throwing out leftovers **45%**
2. Food reaches “best before” date before using **45%**
3. Buying too much food **33%**

What are Canadians looking for to help them reduce food loss and waste?

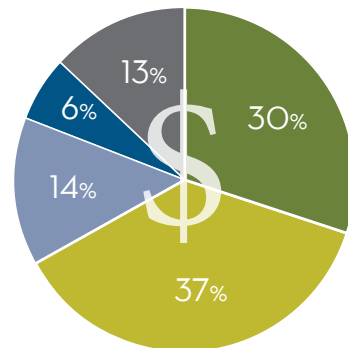
Tips to help you reduce food waste



A combined guide to help you reduce food waste AND recycle food you can't eat



Information to show me how reducing food waste can save money



Very useful Quite useful Not very useful Not at all useful Don't know/Not applicable



We can empower Canadians to reduce their food loss and waste by providing more information and tips, while illustrating that reducing food waste will help to save money in the long run. This ties it back to what is most important to Canadians – the cost of food.

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

A man with a beard and a woman are sitting at a wooden table, looking at a laptop. The man is pointing at the screen while the woman smiles. The background is a wall with some textured, brownish patches.

WHAT MAKES FOOD INFORMATION CREDIBLE?

DIGITAL ETHNOGRAPHY

When it comes to food and how it is produced, misinformation abounds. Why do certain ideas take root and thrive, while others wither on the vine? It boils down to the **share of voice and influence certain consumer segments have** to drive which food news is shared broadly and embraced.

CCFI found in our earlier work that consumers go online to find information about food. We also researched the public trust model that showed **shared values are 3-5 times more powerful than facts when it comes to earning trust**. But what are the values around food and how it is produced? And how do those values impact the

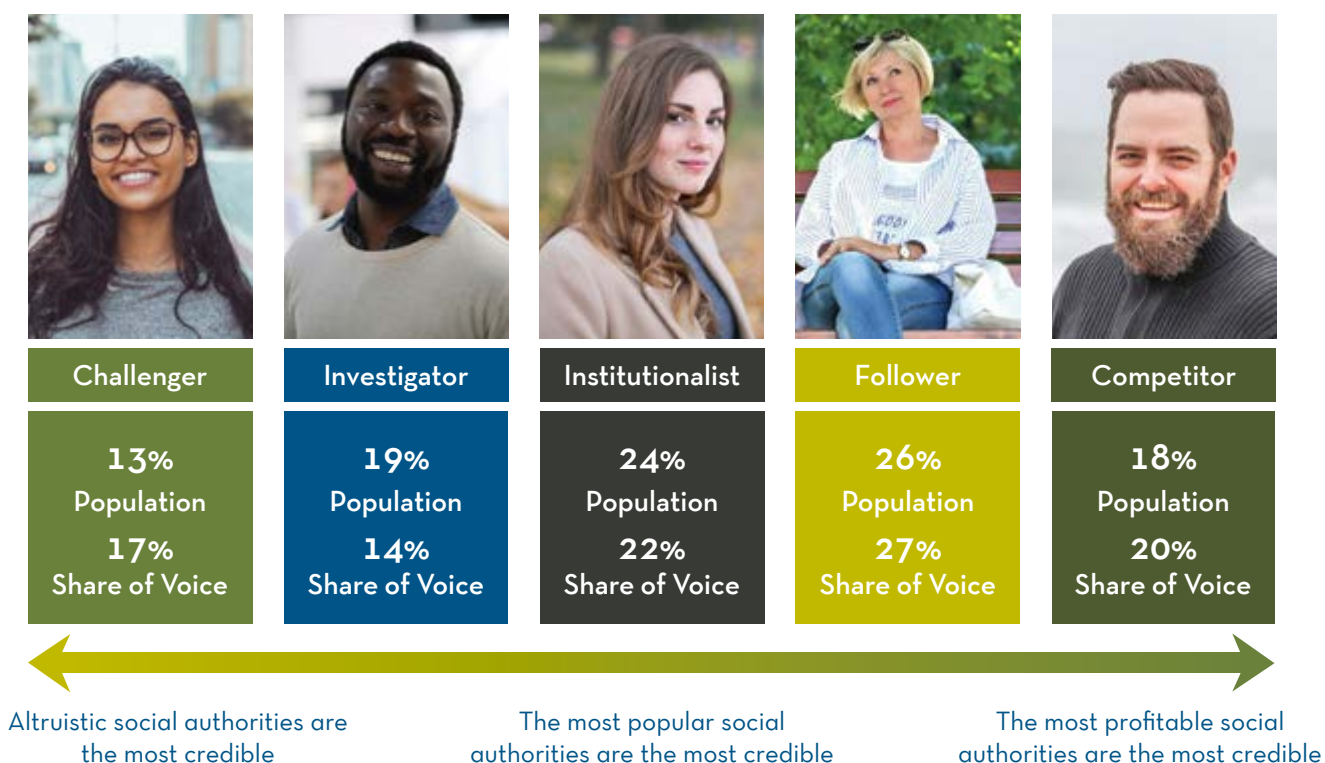
perceived credibility of the information people find online about food?

The Canadian Centre for Food Integrity used an innovative approach called *digital ethnography* to observe 9,200 consumers online across many social channels, **tracking their behaviours and identifying beliefs, values, fears and unspoken motivations** when it comes to food information and how it moves through culture.

It is akin to following digital breadcrumbs that leave a trail showing what consumers **actually** do - not just what they say they do. It gives us *detailed insights* into how - and where - to engage the right audiences to **earn trust**.

THE TRUTH SPECTRUM

Canadians' approach to the credibility of news and information about food is shaped by their belief about social authorities and the role that these authorities should play in society.



Note: These images are chosen to represent the various values-based archetypes, which **do not** address ethnic differences.

WHAT MAKES FOOD INFORMATION CREDIBLE?

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

OPPORTUNITIES



INVESTIGATORS

For the Investigators, there's **an opportunity to engage them with new types of “social institutions.”** One that does the job for them - i.e. takes information from what they consider to be credible sources and seeks additional scientific rigour to validate and update the research.

Through this process, there's also an opportunity to acknowledge **there's no such thing as a perfect fact or “one voice” - which is less trusted.** There always needs to be room for new learning and continuous improvement. This is what makes science tick and allows us to improve and evolve our understanding of issues over time.

This approach meshes with the CCFI work on transparency from 2017. There is a need for credible information and authentic communications, which includes acknowledging concerns and areas needing improvement. There is also an opportunity to increase share of voice for credible experts through non-traditional channels.

INSTITUTIONALISTS

There's an opportunity to own the idea of updating trusted, institutional data with new developments in a timelier way, most notably in the field of nutrition and food science. Of course, they need this information in easily consumable formats, in the form of simple infographics, stats, videos and packaging stamps of approval from governments and other trusted third parties.

WHAT ABOUT THE OTHERS?

Outside of these two archetypes, the right of the spectrum (Follower and Competitor) will react positively to trusted and well-known brands. The Follower is a difficult group to meaningfully impact without significant investment or “star power” to get a large share of voice and attention. The Challenger will always look at any source of information with skepticism.

There is a good opportunity to connect with the Competitor in other business sectors and leadership roles in social or community efforts.



There is an opportunity to create new or support existing social institutions.

A social institution consists of a group of people who have come together for a common purpose. These institutions are a part of the social order of society and they govern behaviour and expectations of individuals.

Examples of social institutions include: family, religion, peer groups, educational institutions and research communities, civil society and NGOs – charitable organizations, advocacy groups, think tanks and virtual communities.



WHAT WE LEARNED AND HOW TO APPLY IT

CCFI coordinates this research to benefit the entire food system – from individual farmers to food retailers and everyone in between. Share and use these findings to inform your work to increase public trust, from everyday conversations to comprehensive communication efforts.

The investment in public trust needs to be viewed as a long-term strategy, not a short-term public relations exercise. The tracking data helps to identify trends and measure hot topics over time. It provides a valuable perspective on how issues compare to others and gauge what's important to consumers overall. How have concerns shifted over time? How are Canadians different or the same as Americans?

This year's research is unique in several ways. The focus on food loss and waste sheds light on an issue that is gaining momentum in the news and among Canadians, and one that can impact

overall trust. How can you and the rest of the food system do better? How can you empower Canadians to do the same at home?

Our 2016 Public Trust Model showed that connecting with shared values is three-to-five times more impactful than facts alone in building public trust. This year's digital ethnography research provides insight into what those values are when it comes to trust in food-related news and information.

Take a look at your organization and assess where you might fall most often on the belief spectrum. Are you connecting with or deterring those you're trying to reach? Can you adjust your approach to be more effective with a specific archetype?

HERE IS A SUMMARY OF THE KEY INSIGHTS FROM THIS YEAR'S RESEARCH:

Concerns On the Rise – Cost of Food Still at the Top

Overall concern has risen for a long list of life concerns and topics, often significantly compared to last year. One thing has remained consistent: for the third year in a row the rising cost of food is the top-rated life concern, up a significant 5 points since 2017. Keeping healthy food affordable maintains its position as the second most important but is now tied with rising health care and energy costs. The importance of food-related consumer concerns is underscored by the fact that only 17% of Canadians agree that Canadian food is amongst the most affordable in the world today, even though that is factually correct. Overall, the message is clear – Canadians want access to healthy affordable food. Use these findings as guiding principles when developing priorities, programs, collaborating with others and communicating your results putting what's most important to Canadians first.

Erosion of Perceptions - A Rally Call

This year, we saw a significant decrease in several key measures when it comes to public trust in the food system. Only a third (36%) of Canadians think the food system is headed in the right direction compared to four in ten last year (43%). Along with this decrease, the proportion who feel the food system is on the wrong track increased a significant 9 points and is back to 2016 levels (23%). Although over half have a positive view of Canadian agriculture (55%), this is down significantly compared to 2016 (61%) dropping for the first time since 2006. While this requires several years of data to indicate a truly negative trend, these results should serve as a rally cry to food system leaders and a reminder that public trust needs to be earned.

Connect with Values

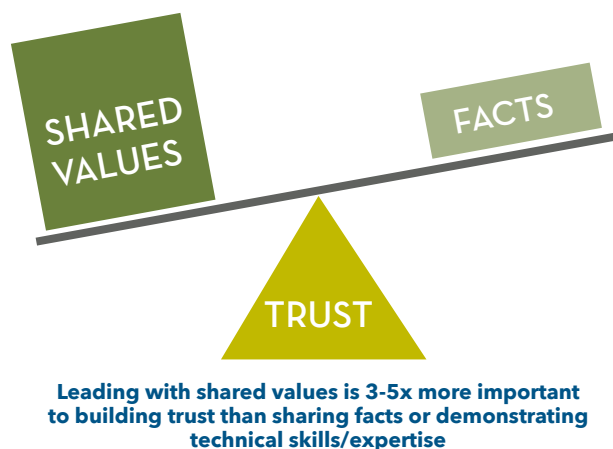
Use the CCFI research findings to put a new lens on how you evaluate your target audiences. Values-based archetypes will be key to your success in earning public trust.

Connect with Investigators - New Social Institutions Needed

The Investigator archetype is an important segment to understand and connect with. With their influence through to Institutionalists and Followers, they represent a significant percent of the population and pathway to reach those who may not be tuned into your existing channels.

For the Investigators, there's **an opportunity to engage them through new types of “social institutions.”** One that does the job for them - i.e. takes information from credible sources and seeks additional scientific rigour to validate and update the research.

This is the very model that www.bestfoodfacts.org was developed around - an online resource centre featuring credible experts sharing their answers and opinions about anything on your plate in a foodie friendly manner; without company logos or product promotions, with no vested interest in selling or advocating for positions. It's also written with more than one expert perspective



on complex topics, which adds to the credibility. One simple answer for this group is not the right approach.

Turn up the Transparency

The report card on transparency is in the ‘needs improvement’ category for the entire sector, including key players such as academia and government. While there are many great efforts to share information openly with the public from individuals, companies and organizations across the supply chain - the average Canadian isn’t seeing or hearing it just yet. Putting the filters of the values based archetypes onto our thinking - some of the efforts may be discounted as marketing or profit driven and not really reaching the intended target audiences.

The public trust framework developed a few years ago was built on three pillars: doing the right thing; trusted assurance systems and regulations; and communications - all underpinned with the spirit of continuous improvement and research, with the need for coordination between all. While the investment in doing the right thing and assurance systems is tremendous and growing, the investment in communications and transparency about this work is not yet.

Public trust is a fundamental base that is needed for the future growth and success of the food system - from the farms that grow it to where it is put on our plates and everything in between. The investment in this area should be considered a core commitment to a business risk and opportunity, with a long term view.

WHEN INFLUENCERS TALK, WHO’S LISTENING?




INVESTIGATORS ARE KEY.

They influence both the **Institutionalist** and the **Follower** when it comes to food related news.

Their influence on the Follower is quite direct. It simply revolves around new trends in food. *When Investigators work to make trends popular, the Follower takes notice.*

Their influence on the Institutionalists is a lot more subtle and it revolves around questioning government and regulatory stamps when something happens to them personally, such as struggling to lose weight or suffer from food insensitivities.



To build trust, those in the food system must demonstrate that while systems have changed and the use of technology has increased, the commitment to doing what's right has never been stronger.

2018 CANADIAN PUBLIC TRUST RESEARCH ADVISORY PANEL

Our thanks to the CCFI Research Advisory Panel members for sharing their insights and expertise related to public trust research, for this year and in the future. Look for more from this panel as CCFI works to expand communications to include research from the panel members and other efforts related to public trust in 2019.

Dr. Andreas Boecker

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Dr. Sylvain Charlebois

Professor in Food Distribution and Policy, Dalhousie University and Scientific Director, Institute of Agrifood Analytics

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Dr. Alexandra Grygorczyk

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Charlie Arnot

CEO, The Center for Food Integrity

Crystal Mackay

President, Canadian Centre for Food Integrity

Ashley Bruner

Research Coordinator, Canadian Centre for Food Integrity

RESEARCH FUNDING

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

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

With thanks to the following for their investment in additional provincial data collection and reporting to advance public trust efforts in their provinces in 2018:

Alberta Agriculture and Forestry

Nova Scotia Department of Agriculture

The topic of food loss and waste was funded as part of a project “Taking Action on Food Loss & Waste” in partnership with Provision Coalition with funding from the Walmart Foundation.

OUR APPRECIATION

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



THE CANADIAN CENTRE FOR
FOOD INTEGRITY



LE CENTRE CANADIEN POUR
L'INTÉGRITÉ DES ALIMENTS

FROM INSIGHTS TO ACTIONS

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

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