



2016 CANADIAN PUBLIC TRUST RESEARCH



WITH INSIGHTS FROM MOMS,
MILLENNIALS AND FOODIES



THE CANADIAN CENTRE FOR
FOOD INTEGRITY



THE CANADIAN CENTRE FOR
FOOD INTEGRITY

Helping Canada's food system earn trust

OUR MISSION

The new Canadian Centre for Food Integrity is a division of Farm & Food Care Canada and an affiliate of The Center for Food Integrity, based in the United States.

Our members and project partners, who represent the diversity of the food system, are committed to providing accurate information and working to address important issues in food and agriculture.

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A still life composition of various fresh ingredients arranged on a rustic wooden surface. In the foreground, a large piece of raw red meat sits in a white bowl, garnished with a single green basil leaf. To its right, a large piece of raw pink fish is laid out on a wooden cutting board, also garnished with a basil leaf. In the center, a wedge of yellow Swiss cheese with large holes is prominently displayed. To the left of the cheese, a white bowl is filled with a mixture of granola and dried fruit. Above the granola, three brown eggs are visible. To the right of the cheese, a glass pitcher is filled with white milk. Further right, a small white bowl contains a mix of nuts and seeds. In the background, a bowl of white mushrooms sits next to several red and yellow apples. The overall scene is well-lit, highlighting the textures and colors of the food.

WHAT WE LEARNED AND
WHY IT'S IMPORTANT

WHAT WE LEARNED & WHY IT'S IMPORTANT

It's simple: when it comes to building trust, connecting through shared values is the first step.

Food is personal and shapes our cultural identities. Food issues are particularly important to Moms, Millennials and Foodies. Because these issues are meaningful and relevant, we can find ways to connect. Once you establish the values-based connection, you are then given permission to introduce technical information.

In this report, we will share results of our inaugural 2016 public trust research and highlight some best practices that the Canadian food system can use as a guide for increasing trust. The research reveals who the public has the most trust in and who they hold most responsible on a number of key food system issues.

This research provides a model and strategies for success and for discussing complex issues about our food system. It's a model that can be applied when engaging with the Canadian public to earn trust around topics that are critical to meet the growing demand for food while preserving our natural resources.

Canadians have very clearly identified where and from whom they want to access information that is most important to them about their food. Now it's up to Canada's food and farm leaders to come to the table to address those needs, reconnect and engage.

A man and a woman are shopping in a grocery store. The man, on the left, is wearing a light blue button-down shirt over a grey t-shirt and is looking down at a white plastic bag he is holding. The woman, on the right, has long brown hair with sunglasses perched on her head and is wearing a brown cardigan over a white top. She is pointing her right index finger towards the man's bag. In the foreground, there is a red plastic shopping basket filled with various items, including a white plastic bag and some yellow produce. The background shows shelves stocked with green produce, likely leafy vegetables. The overall scene is brightly lit, typical of a modern grocery store.

THE CONSUMER TRUST MODEL - WHY IT MATTERS

BUILDING PUBLIC TRUST

“People don’t care how much you know until they know how much you care.”

This quote, often attributed to Theodore Roosevelt, sums up what the Canadian Centre for Food Integrity (CCFI) learned by testing The Center For Food Integrity’s (CFI) peer-reviewed and published model for building trust in today’s food system in Canada.

Our research shows that confidence (shared values) is at least three times more important than competence (skill and expertise) in building consumer trust. These findings are consistent with the US CFI research. Specifically, our study measured what drives consumer trust in the areas of food safety, nutrition, the humane treatment of farm animals and environmental sustainability.

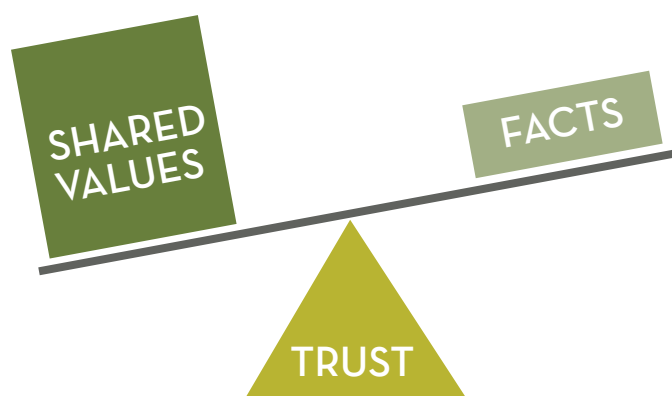
What drives public trust?

Through our research, we’ve learned that consumers trust farmers because they believe they share their values. Unfortunately, consumers aren’t sure today’s agriculture still qualifies as farming. Why? Generational and geographic distance between farmers and consumers, technological advances in farming and changes in farm size and structure. We see consumer alienation from agriculture and the food system expressed through concerns about nutrition, food safety, affordability, environmental sustainability, animal well-being and other issues.

Some argue that maintaining public trust is a worthy goal, but not relevant to success in business. This outdated notion fails to recognize the financial benefit of maintaining trust of stakeholders who can determine the level of social license or social control an organization enjoys.

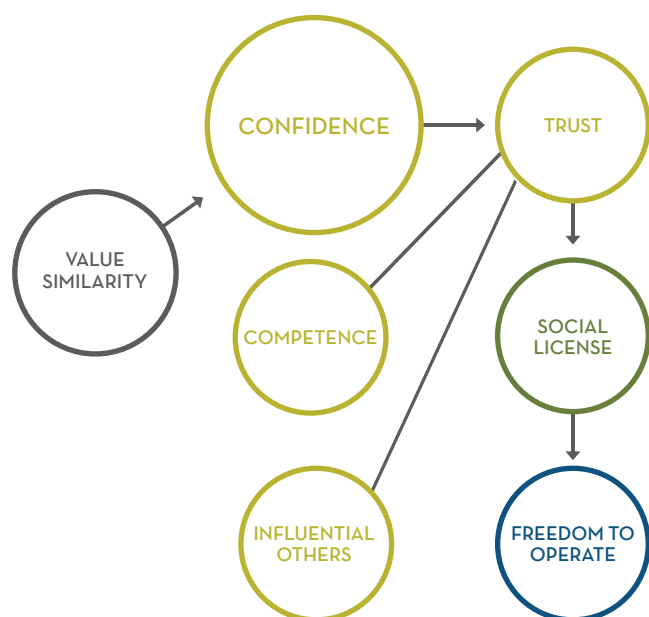
Public Trust: a belief that activities are consistent with social expectations and the values of the community and other stakeholders.

Social license: the privilege of operating with minimal formalized restriction, (legislation, litigation, regulation or market mandates) based on maintaining public trust by doing what’s right.



Leading with Shared Values in 3-5x more important to building trust than sharing facts or demonstrating technical skills/expertise

Consumer Trust Model



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Of the three primary drivers of trust – **confidence** (shared values and ethics), **competence** (skills and ability) and **influential others** (family, friends and credentialed individuals) – **confidence** is most important in building trust.

Every organization, no matter how large or small, operates with some level of social license. Organizations are granted a social license when they operate in a way that is consistent with the ethics, values and expectations of their stakeholders. Stakeholders include customers, employees, the local community, regulators, legislators and others who have an interest in how the organization impacts them. Maintaining the public trust that protects your social license to operate is not an act of altruism; it is enlightened self-interest.

Once lost, either through a single event or a series of events that reduce or eliminate stakeholder trust, social license is replaced with social control. Social control is regulation, legislation, litigation or market demands designed to compel the organization to perform to the expectations of its stakeholders. Operating with a social license means more flexibility and lower cost. Operating with a high degree of social control increases costs, reduces operational flexibility and increases bureaucratic compliance.

Every sector of the food system, whether farmers, manufacturers, branded food companies, grocery stores or restaurants, is under ever-increasing pressure to demonstrate they are operating in a way that is consistent with stakeholder values and expectations. Groups opposed to today's food system are pursuing litigation, pressuring branded food companies, and initiating legislation to change how the system operates.

Historically when under pressure to change, the industry has responded by attacking the attackers and using science alone to justify current practices. Too frequently, the industry confuses scientific verification with ethical justification. Not only are these approaches ineffective in building stakeholder trust and support, they increase suspicion and skepticism that the food industry is worthy of public trust.

As consumer values change, the food system needs to evaluate and potentially modify current practices and fundamentally change the way it communicates in order to maintain consumer trust. Meaningful stakeholder engagement

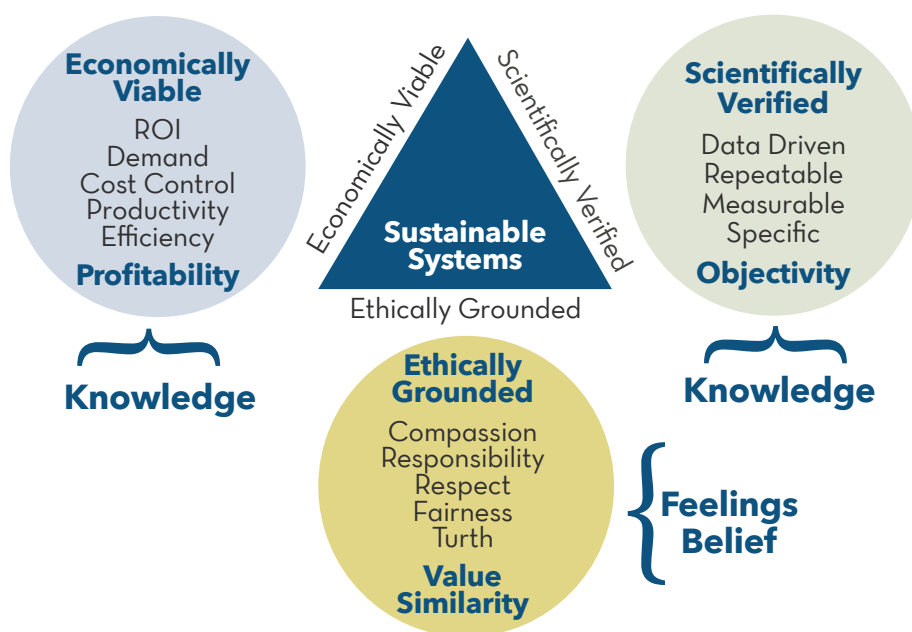
and effective values-based communication with consumers is essential to maintaining the trust that protects social license.

Building a truly sustainable food system requires balance. Maintaining public support requires our practices be ethically grounded and consistent with the values of our stakeholders. Objective, independent data is essential to evaluate progress

and support scientific claims of improvement. Reasonable profitability is essential to assure economic viability. It is only by balancing these sometimes competing interests that we can have a food system that is truly sustainable and supported by our stakeholders and the rational majority of consumers.

We have learned that consumers trust farmers because they believe farmers share their values.

Sustainable Balance



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



THE 2016 RESEARCH

The 2016 web-based survey was completed in February and March by 2,510 respondents who are representative of the Canadian population. The research builds on previous waves of the Farm Issues Study conducted by Farm & Food Care Ontario and the Ontario Farm Animal Council, with trend data to 2006.

This public trust research provides a benchmark on the model and comparison to consumer trust studies undertaken by The Center for Food Integrity in the United States since 2007. The Consumer Trust Model was tested using food system issues in food safety, nutrition, the environment and animal welfare.

By using The Center for Food Integrity (CFI)'s peer reviewed and published Consumer Trust Model, our research explores how food system stakeholders – from farmers, agribusinesses, food companies to retailers and restaurants – can increase their understanding on how to earn trust on a variety of food system topics.

“Consumers” are not a homogenous group.

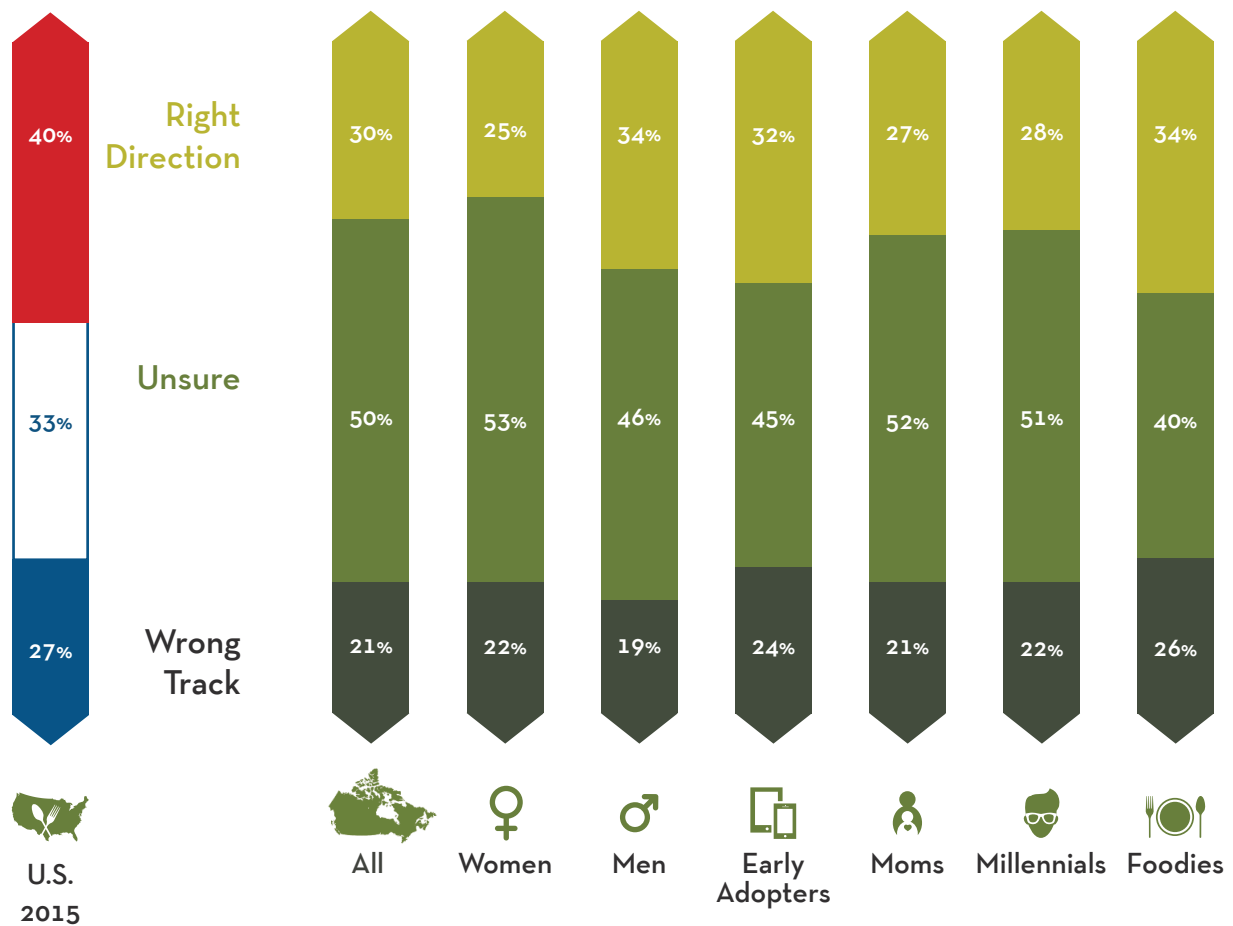
To provide deeper insights, we segmented the respondents into three groups: Moms, Millennials and Foodies. The research was also segmented by the Everett Rogers Diffusion of Innovation theory which seeks to explain how, why and at what rate new ideas and technology spread through cultures from Innovators to Laggards. We focus on Early Adopters as the group with the highest degree of opinion leadership, as others look to them for information when making decisions.

The segmentation of this research will help us better understand what's most important, relevant and likely to build trust with Moms, Millennials, Foodies and Early Adopters in today's environment.



IS THE CANADIAN FOOD SYSTEM HEADED IN THE RIGHT DIRECTION OR DOWN THE WRONG TRACK?

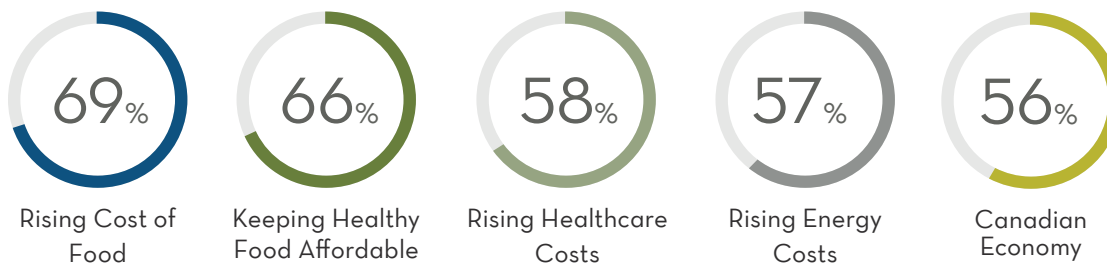
This directional question will serve as a benchmark for Canada's food system moving forward. In 2016, exactly half of Canadians are unsure, compared to one third of Americans.





MOST CONCERNING LIFE ISSUES IN PERSPECTIVE

Survey participants were asked to rate their level of concern on several life issues including broad areas such as healthcare costs, unemployment, food safety and food affordability. Consumers are generally more concerned about most of the life issues in 2016 compared to 2012. **The rising cost of food and keeping healthy food affordable** are the food-related issues that made the top five.



MORE FOOD SYSTEM CONCERNS



Food Safety

54%



Humane Treatment
of Farm Animals

43%



Having Enough Food
to Feed Canada

42%

 **WOMEN**
were more concerned
about most issues than men

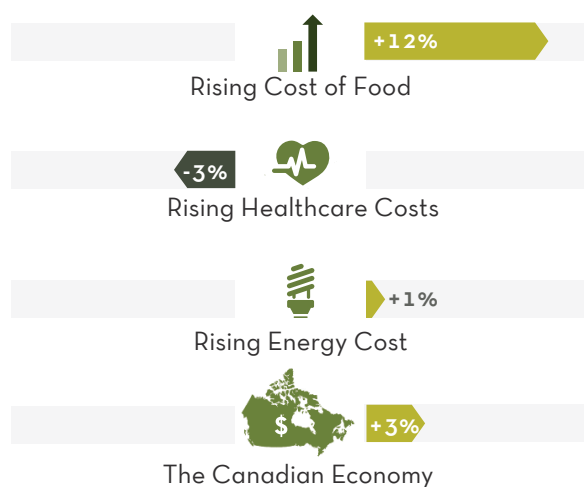
 **EARLY
ADOPTERS**
were more concerned about
all issues than later adopters

 **24% LOWEST
CONCERN**
was for having enough food to
feed people outside Canada

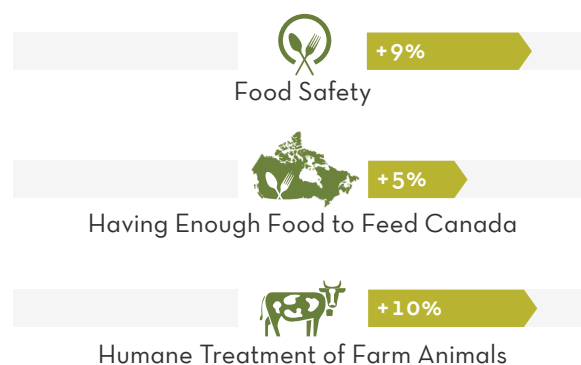
The numbers reflect the percentage of those who gave the issues a “top box” rating, or an 8-10 rating on a 0-10 scale where 0-3 is a low level of concern, 4-7 is a moderate level of concern and 8-10 is a high level of concern.

CANADIANS ARE MORE CONCERNED ABOUT MOST OF THE TOP ISSUES IN 2016

CHANGE IN TOP CONCERNS 2012 vs. 2016



CHANGE IN FOOD SYSTEM CONCERNS 2012 vs. 2016



TOP CONCERNS ABOUT ISSUES BY SEGMENT

MOMS



MILLENNIALS



FOODIES

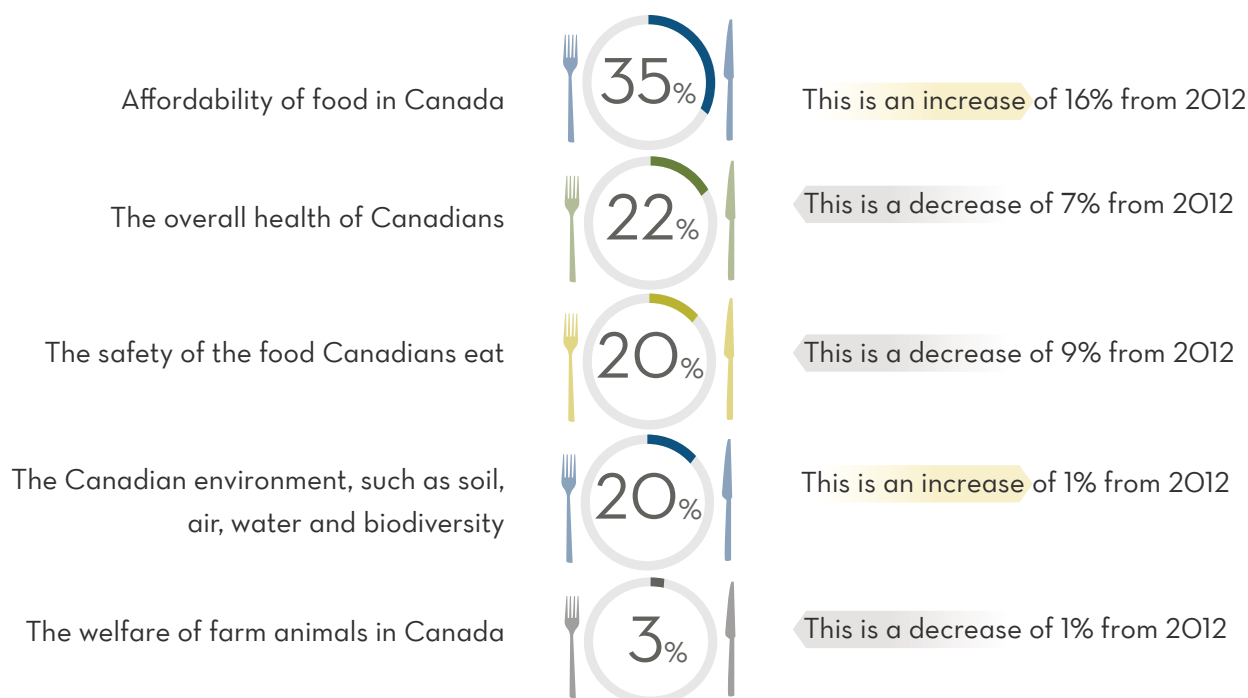


*Foodies expressed a higher level of concern on all issues

The numbers reflect the average level of concern for each segment about each issue. Respondents were asked to rate their level of concern on a scale of 0 to 10, where 0 is no concern and 10 is a high level of concern.

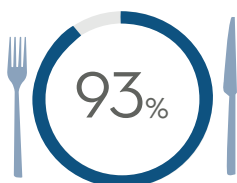
RANKING THE FIVE PRINCIPLES OF SUSTAINABLE FOOD AND FARMING

Canadians are increasingly concerned about the price of food. When asked to rank the five principles of sustainable food and farming, food affordability was ranked the most important, rising 16% and two places in ranking since 2012. The research provides context for the principles of sustainable food and farming.



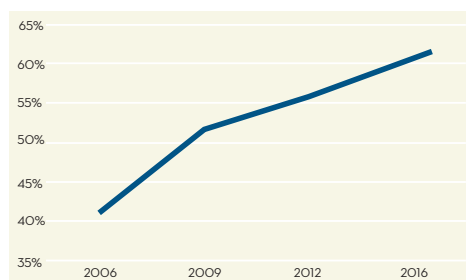
IMPRESSIONS AND KNOWLEDGE

How well informed would you say you are about Canadian farming practices in general?



Know a little, very little or nothing.
This is unchanged from 2012.

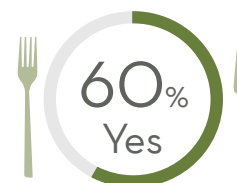
What would you say is your overall impression of Canadian agriculture today?



*Respondents who said they have a very positive or somewhat positive impression of Canadian agriculture are combined.

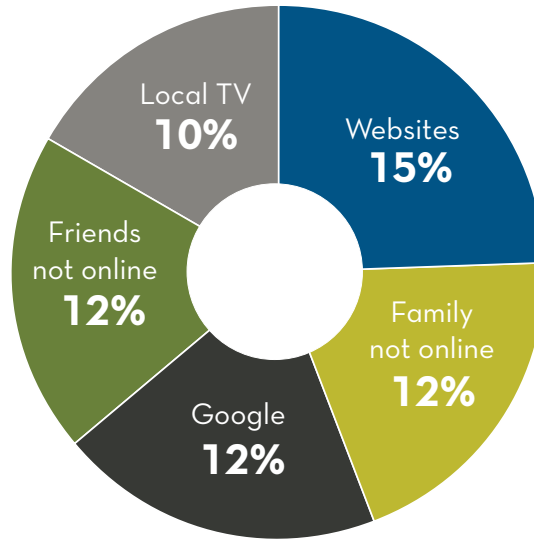
In 10 years, Canadians' positive impressions of agriculture have increased by 20% **from 41% in 2006 to 61% in 2016.**

Would you like to know more about farming practices?



This is unchanged from 2012.

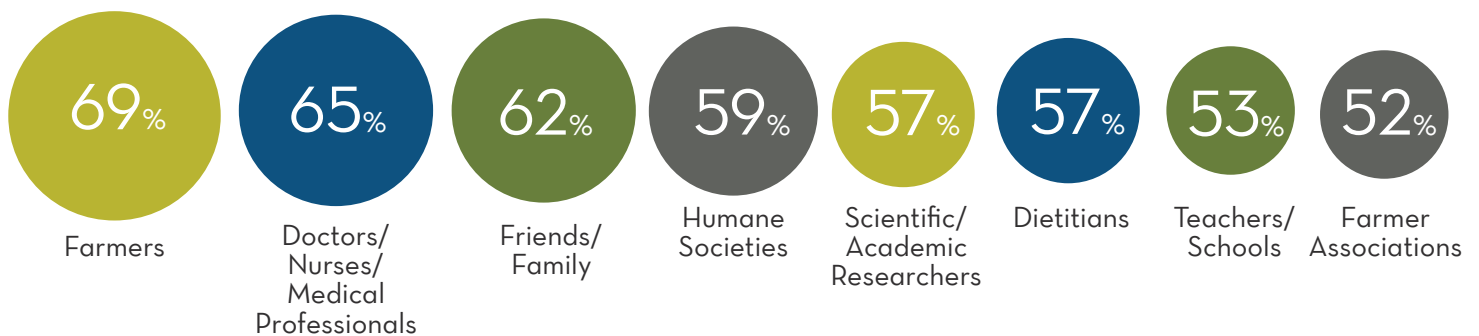
TOP 5 INFORMATION SOURCES



IMPRESSIONS OF FOOD AND FARMING SOURCES

Canadians' impressions of farmers grew to be more warm and favourable than any other group with an increase from 61% in 2012 to 69%, the highest level seen in 10 years. Overall, there were increases in warm and favourable impressions across many categories.

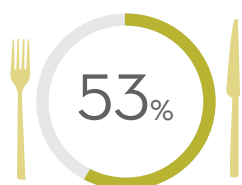
Top eight viewed favourably by half or more



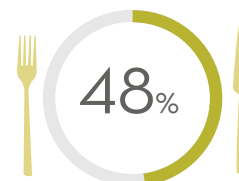
Those viewed less warm and favourably



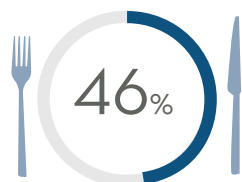
PUBLIC ATTITUDES 2016



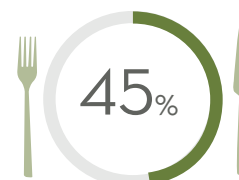
I am more concerned about the affordability of healthy food than I was a year ago.



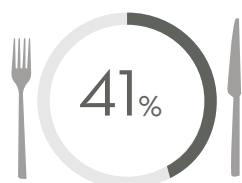
I am personally concerned about the use of hormones in farm animals.



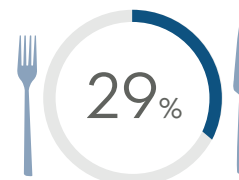
I am personally concerned about the use of pesticides in crop production.



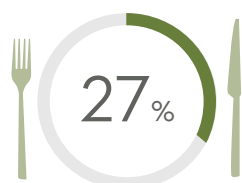
I am personally concerned about drug residues in meat, milk and eggs.



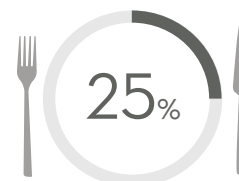
I am personally concerned about eating food that comes from genetic engineered crops.



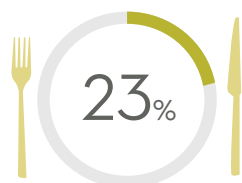
Canadian farmers are good stewards of the environment.



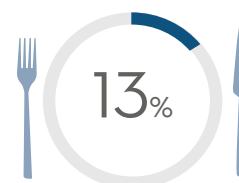
Videos of farm animals being treated poorly are not representative of normal livestock farming.



Animals should have the same rights as humans.



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



Canadian food is amongst the most affordable in the world today.





WHAT WE LEARNED AND HOW TO APPLY IT

Connect with issues that matter to Canadians

Concerns about the price and affordability of food is the highest it's been since 2006 - greater than both health care and the economy. Only 13% of Canadians believe our food is amongst the most affordable in the world. Healthy, affordable food needs to be a priority for all.

Unsure is a unique Canadian opportunity

Only one in three Canadians think the food system is moving in the right direction. With half our population unsure, there is an opportunity to engage with Canadians and work towards earning trust and shifting their perceptions of the Canadian food system to the 'right track'. This directional statement illustrates a difference from the US data with only one third of Americans unsure if the food system is on the right track south of the border.

Connect with shared values first

The testing of the Consumer Trust Model in Canada shows that **confidence (shared values)** is at least three times more impactful than competency (skills and technical expertise or science) in building consumer trust. **In other words, it is not just about giving consumers more science, research and more information.** It is about demonstrating that you share their values when it comes to topics that matter to them most - healthy affordable food, quality nutrition, responsible animal care and environmental stewardship and others.

Knowledge low, opinions strong, impressions high

Consistent with tracking data over the past 10 years, Canadians know very little to nothing about farming but still have strong opinions about many food system issues. The dilemma and pressure points are between "the customer is always right" and the "experts and farmers know best" philosophies.

Canadians rated farmers as the most warm and favourable group in the country, at the highest level seen since tracking began in 2006. There is a disconnect, however, between the farmer as an individual and some farm practices or food system issues which are not viewed as favourably. What is the best way to reconnect and have meaningful conversations with those who have little knowledge or context on often technical or complex issues? This is not just a question of food system connecting with the public, but also between and across our own food system stakeholders.

Focus for success

Earning public trust by having conversations with Canadians about food is a big picture goal and tough to measure any movement on. To be more successful, the food system needs to focus our efforts on key influencers and target audiences. When looking at the Moms, Millennials and Foodies segments, Foodies express more concerns about issues but they also have the most positive attitudes about food system issues. Women are more concerned about all food issues than men. Millennials seem to be somewhat disenfranchised, often rating their competence, confidence and trust of the food system lower than any other segment. This is something that the food system needs to monitor and continue to research as Millennials age and their buying power and influence increase.

Identify important audiences to engage with. Who are the early adopters - or opinion leaders - within those groups? What are their values and concerns? Who are the likely sources they view as credible and trusted? Where do they go for information? **Listen to and understand their values, embrace skepticism, questions and concerns before developing your strategy.**

Shift in trust and communications

There seems to be a shift in the nature of trust and the trust in sources. This may be because Canadians view certain groups expressing shared values that are more consistent with their own, while more traditionally trusted sources are relying on their expertise and knowledge to convey their views. The need for credibility continues to grow in importance.

Society has shifted to masses of communicators with multiple sources and no one in control of the message or messenger. Food system stakeholders cannot rely on conveying their expertise in traditional approaches to inform and influence consumer opinion.

Go where the conversations are

There is an opportunity to build trust and reduce concerns by connecting and providing accurate, information through a broad base of sources of information - websites, Google and local TV. Conversations with consumers about food system issue offline are also important since family and friends are also key sources of information.

Unlike the way our food system is organized (by issue, by province, by sector, by organization), our target audiences are having conversations about what's on their plate and how it gets there. We need to join those conversations.

Defining the benchmarks for success

Consumer trust in groups or sectors has an impact on their willingness to grant social license to some degree, but it is not the only factor. Consumers expressed concerns about food system issues and are not willing to give carte blanche to any one group. This research highlights the issues around and the model

needed for social license as an outcome of earning public trust. As other sectors have learned, social license cannot be 'granted' and the definitions of achieving such a broad based term can be easily misrepresented.

Addressing the concerns Canadians have about food affordability, nutrition, food safety, the environment, and animal welfare in an authentic and transparent manner will help earn public trust.

Canada's food system should clearly establish the benchmarks for a successful sustainable future with earning public trust as a foundational principle.

Long term game plan

Building trust is a commitment, not an event. Authentic transparency and continued engagement using the models and insights from this research will help lead the way to earning public trust in our Canadian food system. This research serves as a benchmark and a good first step in a coordinated approach with a long term shared vision.

Put this research to work

The purpose of this work is a shared investment in helping Canada's food system earn public trust. Take these findings and use them to evaluate and inform your existing work. Take a look at your efforts, your resources and strategies. Make this research actionable right away. How can we improve?

When making plans for a new strategy, tactics or implementing work related to earning public trust with Canadians, get this research out and put it to work by using the "begin with the end in mind" approach.

The Canadian CFI Public Trust Research includes more than can be included in any single report. We have additional insight, segmentation and detail available. Give the Canadian CFI team a call or an email for some guidance and insights that can help inform your work and future success related to earning public trust.



2016 CANADIAN PUBLIC TRUST RESEARCH ADVISORY PANEL

Our thanks to the team for their insights and leadership in developing and implementing the inaugural Canadian public trust research. This work will continue annually and evolve to take a closer look at different segments, topics and actionable concepts such as transparency and what it takes to achieve it with today's societal expectations.

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RESEARCH FUNDING

Funding for this research comes from the shared investment of all the members of the new Canadian Centre for Food Integrity. Our members represent the diversity of the food system with a commitment to providing accurate information and working to address important issues in food and agriculture.

This research is intended to be widely communicated for the benefit of the entire food system to help better understand the Canadian public's views and expectations of our food. Permission is granted to share any of this work with credit to the "Canadian Centre for Food Integrity".

With thanks to the following for their investment in additional provincial data collection and reporting:

Alberta Agriculture and Forestry

Nova Scotia Department of Agriculture

Ontario Ministry of Agriculture, Food and Rural Affairs

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 for earning public trust in food systems continues to evolve. The work of the new Canadian Centre for Food Integrity would not be possible without the solid foundation of investment, research and expertise already firmly 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 opportunity to become an affiliate and share in your investment in helping us earn public trust.



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Additional insight, segmentation and detail are available. If you or your organization would like more information on the research or membership with the Canadian Centre for Food Integrity, or would like to schedule a presentation, please contact us via email learnmore@foodintegrity.ca or (855) 200-1326.

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