

Submission to the Standing Committee on Agriculture and Agri-Food

Perception of and public trust in the Canadian agricultural sector

Scheduled to present on March 21st, 2019 but session cancelled



THE CANADIAN CENTRE FOR
FOOD INTEGRITY



LE CENTRE CANADIEN POUR
L'INTÉGRITÉ DES ALIMENTS

Canadian Centre for Food Integrity Submission to House of Commons' Standing Committee on Agriculture and Agri-Food AGRI: Perception of and Public Trust in the Canadian Agriculture Sector Study

About 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**. Specifically is a respected coordinator of trust-focused research, dialogue, resources and training. In these early stages since launch in 2016, 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 to help Canada's food system earn trust for the future.

From farmers to governments and the largest food companies, discussions around public trust and transparency continue to evolve across the agri-food sector from coast to coast. There is a need to understand what consumers think and feel about our food and the food system overall. Deeper than traditional consumer attitude studies, there is also a need to understand what it takes to earn trust with those consumers with a big picture food system approach. Understanding the challenges and realities of public perceptions, values and how to action those insights to earn trust in food and farming will continue to be a priority for all stakeholders and governments in the long term.

Comments and Insights from CCFI Chair, Kim McConnell, C.M.

My interest in understanding and mapping a better path for public trust in Canadian agriculture and food started when I was one of a small team that championed an initiative referred to as The Canadian Journey to Public Trust. This year-long journey began in 2015 and involved over 300 leaders in Canada's food system – from farmers to CEOs and senior leaders of agribusinesses, processors, food companies, retailers and food service – including governments, both federal and all provinces.

One of the key pieces identified in the Journey process was the need for a service provider. The Canadian Centre for Food Integrity was formed in 2016 as a not-for-profit organization with charitable status whose mission is to help Canada's food system earn public trust through research, resources, and forums for dialogue. Unlike advocacy groups, our members and partners very uniquely represent the diversity of the food system, from individual farmers through to many of Canada's leading agriculture and food companies, farm groups, governments, and academia. Our mandate is very specifically focused on helping the food system earn trust, which includes hundreds of people attending our national Public Trust Summits, presentations and webinars; and providing support to key groups like Agriculture in the Classroom and Farm & Food Care.

The Canadian Centre for Food Integrity has been conducting comprehensive public trust research every year since 2016, with some trend data going back to 2006. These studies are shared widely to provide insights on what the Canadian public thinks about food and expects from Canada's agriculture and food system. We recently released new research that compared the thoughts of the general public to the thoughts of food system stakeholders. Survey respondents differed significantly from the average Canadian. What we also learned was that the issue of public trust is viewed by people employed in the Canadian food system as a macro issue – respondents are more likely view public trust as a risk or concern for the entire agri-food system overall than a

company or sector-specific issue. This finding ties to what respondents say is needed to better earn trust – improved collaboration and coordination. Given the fact that public trust does indeed impact the entire food system, we must then work collaboratively to effectively address this issue.

Between the Journey process and our work at Centre for Food Integrity, a number of lessons were learned that will assist in the industry's success. We learned that:

Food matters to Canadians – Canadians rate the cost of food and access to healthy, affordable food as one of the top concerns – over health care, energy or the economy for the past three years (CCFI research). We learned that increasingly Canadians as well as our global customers want to know more about their food and how it was produced.

Canadians want to know more about how their food is produced – 93% of Canadians know little to nothing about farming and food production. 60% want to know more. They're interested in knowing more about food safety, animal welfare, and the environment. They are looking for accurate information about their food from credible experts, and they go online to find it, and they aren't finding it - the experts are quiet, and the critics are loud! Every Canadian (all your constituents) deserves to make informed food choices from a food system they trust.

Earning trust is important to Canada's food system – the entire food system knows that without trust, investment, innovation and the ability to operate at maximum performance is impeded. In fact, in addition to a commitment to food safety, public trust is the only issue where the entire Canadian agriculture and food industry are united in its goal of earning the trust and confidence of Canadians and its global customers.

Learnings from others – Canada's food system has had the benefit of learning from the lessons of food systems in other countries. We've also had the opportunity to watch other industries that have not taken trust building seriously. And our food system needs to heed their advice and avoid their mistakes on how to effectively earn trust of the public.

The model of building public trust is simple in theory, yet difficult in practice – it involves three pillars (Do the Right Thing; a Trusted Assurance System; and Communications) operating on a foundation of transparency and a commitment to continuous improvement.

The African proverb, "If you want to go fast, go alone; if you want to go far, go together" applies to building trust in food and farming.

Everyone has a role to play – industry knows it must step up ... and it's starting to happen as evidenced by the commitment demonstrated by others making presentations to this Committee. Governments also play a cornerstone role as was declared in the new Canadian Agricultural Policy (CAP). And we must all must do more. The Canadian approach to building trust is unique, and it is capturing attention globally. Increasingly we hear from food system leaders operating around the world that Canada's 'total food system' approach is envied and becoming the model other nations would aspire to have.

What's needed to further elevate progress and leadership?

1. *Team Agri-food* – like the 'Own the Podium' program that united Canada's high-performance sports program, Canada's food system is beginning to work in tandem. Early indications are positive, but the journey has just begun! We're stronger when we work together and we're learning how to do this effectively and efficiently.

2. *Greater coordination* – Canada’s public trust initiative does not require a ‘boss’ but it does require a coordinator that can align the components, answer questions, make connections, provide strategic leadership, and encourage engagement and action.
3. *Governments partnering with industry* – research shows that Canadians want and expect their governments to be involved in Canada’s food system and the job of delivering healthy, affordable food. This aligns with industry’s wants and expectations. Partnership involvement is needed with:

CFIA and government regulatory bodies – these respected bodies play a very important role in assisting members of the food value chain in ‘doing the right thing’ and in providing surveillance and assurance systems that reinforce food safety and best practices. Greater support and involvement in playing a more visible and vocal role is needed. This not only assists the industry and the trust among Canadians, it also elevates Canadian products with global customers.

Funding support – a commitment to provide on-going support is required to fund the role of basic coordination, the glue that is absolutely essential in advancing public trust in the overall system. Like the support governments provide the United Way or 4-H, an investment in legacy funding is required, and then industry will leverage this investment significantly. Current programs don’t enable this type of funding. Please note that government funding is available through various programs including CAP that align and support actions ... and these programs are good. These programs can and do complement industry investment, and they do help reach Canadians and move them from ‘unsure’ to ‘trust’. The core investment in coordinating public trust for the whole food system should not be viewed as a short-term project, but rather a long-term commitment with the government as a partner at the table.

Trust in Canada’s food system is important to Canadians, your constituents. Canadians want to have trust in their food and transparency on how it is produced. And they want to have trust that the environment is being protected and sustainable practices are being employed. The benefits of a united, coordinated public trust program are extensive.

Canada’s agriculture and food industry is important to Canada and Canadians. It’s an industry of growth, an industry of opportunity, and an industry for major employment. And trust is a foundational cornerstone. Canada’s food system wants their government to be a partner in advancing public trust. As the representative from the Canadian Centre for Food Integrity who holds responsibility for helping all the players in Canada’s food system earn public trust, we are requesting government to align your funding support so it truly complements this total industry support initiative; and encourage and enable your highly respected branches, departments and employees to become fully engaged. Together, we will go far!

About CCFI Public Trust Research

CCFI coordinates public trust research related to food, farming and the food system. This work is coordinated with a shared investment model for credibility. It serves as an independent benchmark to measure progress for the food system, and open communications plans to help inform many across all supply chains and governments.

- **Trends & US comparisons:** CCFI research is a combination of Canadian trend data going back to 2001 from our predecessor groups, and US CFI public trust research which started in 2007. This provides unique value for the sector with trend data and North American comparisons.
- **Benchmark and progress:** As the journey and investment in public trust is relatively new in Canada, this work serves as a valuable benchmark and guideposts for earning trust in the long-term.
- **Communications:** While many invest in consumer research, few share the results or look at the broader food system holistically with a focus on trust and an open communications mandate. See summary reports and webinars of findings in French and English at www.foodintegrity.ca.
- **Credibility:** This research is funded by the full range of CCFI members and government partners. Results are openly communicated for the maximum credibility possible with sector funded work, with no commercial interests.

This document provides a summary of objectives and key findings of CCFI's public trust research from 2016 to 2018, with some trend data going back to 2006. See reports and webinars in more detail in French or English on www.foodintegrity.ca

Summary of CCFI Research

2019: Online Conversations + Public Trust Tracking (to be released Nov 2019)

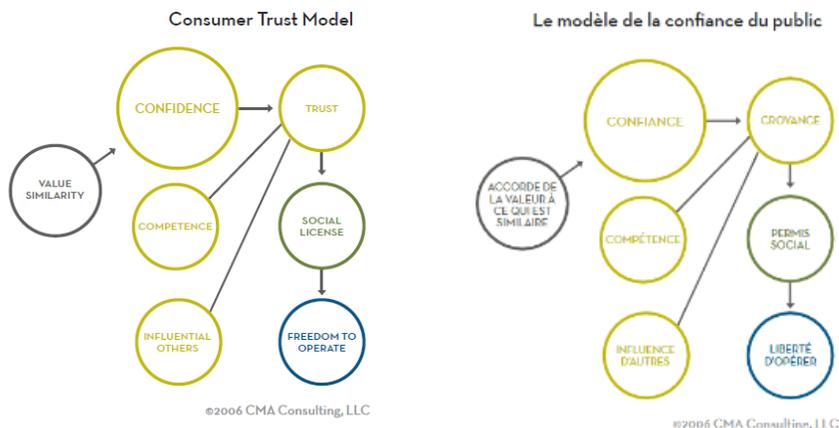
2018: Public Trust Tracking + Digital Ethnography

2017: Public Trust Tracking + Transparency

2016: Public Trust Tracking + Public Trust Model

2016 Public Trust Model

Shared values are 3-5 times more important than facts when it comes to earning trust.



2018 Public Trust Tracking

Objectives - To gauge and track public attitudes about Canadian food, agriculture and food system issues, with comparison to U.S. CFI data *Special feature: develop baseline data on food loss and waste*

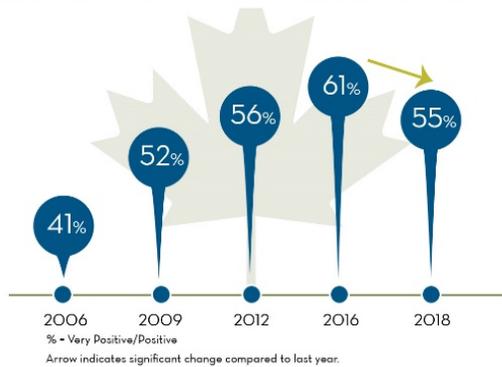
Methodology - Online survey among a representative sample of 1,509 Canadians aged 18+ from July 13th-19th using Ipsos' proprietary online panel.

Key Findings

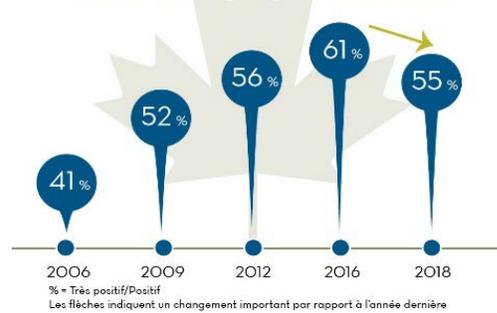
- Overall concern has risen for a long list of life concerns and topics, often significantly compared to last year. One thing has remained consistent: for the third year in a row the rising cost of food is the top-rated life concern.
- Keeping healthy food affordable maintains its position as the second 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.
- There has been an erosion of perceptions on a number of key public trust measures (including direction of the food system and positive impression of Canadian agriculture) and specific topics such as animal welfare. These decreases should serve as a rally cry to the food system and a reminder that public trust needs to be earned.
- Measures on transparency are very poor for the entire sector and requires improvement. While there are many great efforts to share information openly with the public from individuals, governments and organizations across the supply chain – the average Canadian isn't seeing or hearing it just yet.

Attitudes About Canadian Agriculture - Trending Positive with a Downturn in 2018

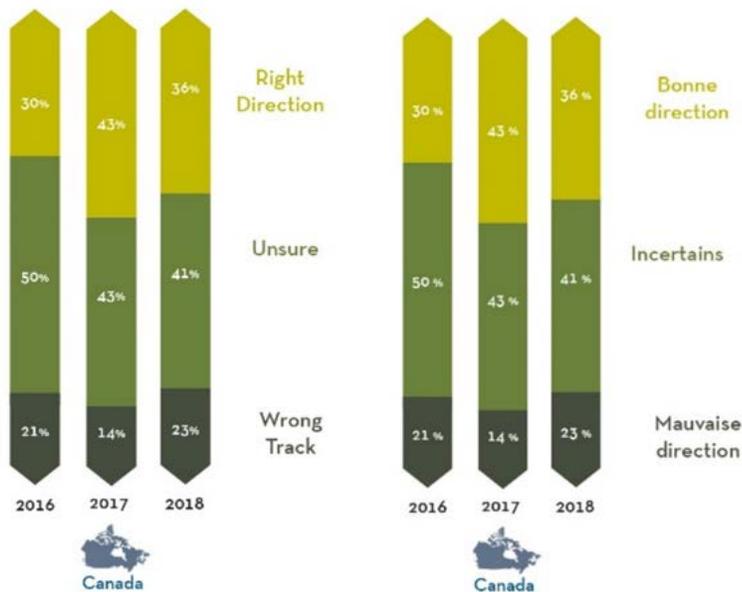
ATTITUDES ABOUT CANADIAN AGRICULTURE



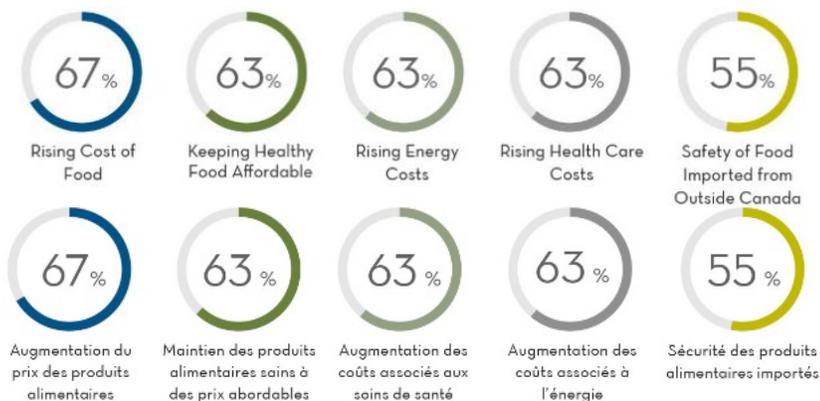
ATTITUDES À L'ÉGARD DE L'AGRICULTURE CANADIENNE



Is the Canadian food system headed in the right direction? Most Canadians are unsure.



What's important to Canadians? Rising cost of food and keeping healthy food affordable top the list of concerns for third year in a row (2016-2018) greater than health care, energy economy.



Transparency Leads to Trust

Who is responsible for transparency in the food system? Everyone.

CCFI 2017

Responsibility for Providing Transparent Information



SEVEN ELEMENTS OF TRUST-BUILDING TRANSPARENCY



LES SEPT ÉLÉMENTS DE LA TRANSPARENCE DANS LE CADRE DE L'INSTAURATION DE LA CONFIANCE



How well is the food system doing at transparency? Needs improvement

CCFI 2018

Transparency Report Card

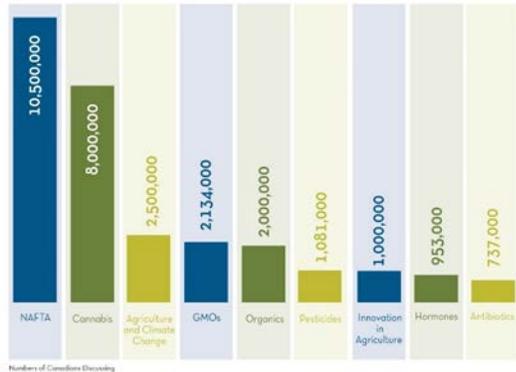


Bilan de Transparence

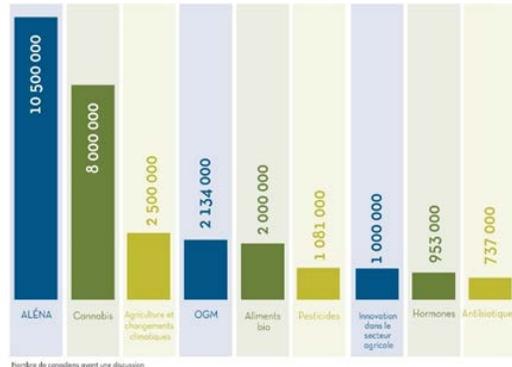


A Study of Canadian Conversations Online on Food and Farming 2017-2018

TOP CANADIAN CONSUMER CONVERSATIONS ONLINE ON FOOD AND FARMING



PLUS IMPORTANTES CONVERSATIONS EN LIGNE DES CONSOMMATEURS CANADIENS SUR LES ALIMENTS ET L'AGRICULTURE



Note: NAFTA and cannabis for context.

Objectives - To uncover the magnitude and sentiment of how Canadians are discussing topics online that matter to the entire food system; including food, health, farm practices, and specifically GMOs, hormones, antibiotics, and pesticides.

Methodology - Utilized a powerful Artificial Intelligence (AI) public opinion research tool which crawls across several social media platforms and scientifically measures public sentiment. By 'listening' to discussions across social media platforms, it can determine how many Canadians are naturally talking and concerned about an issue, without being primed with questions. The study assessed the social media conversations of **254,900 Canadians** for 24 months between **January 2017 and January 2019** across different platforms including Facebook, Twitter and Reddit.

Key Findings

- Canadians' conversations online have centered on a few hot-button issues: the relationship between agriculture and climate change, GMOs and organics.
- Media and current events have the power to drastically magnify issues. For example, 25% of all GMO conversations over the two years was in November after a documentary was released.
- There is value in measuring and monitoring news and conversations online through social media (both positive and negative). This can help guide food system stakeholders to engage in those conversations online. For example, when Canadians' are asked about climate change, the level of concern is not high; however, the volume of conversations happening on this topic is high.
- The role of farmers should not be underestimated. This research shows that Canadians most commonly associate farmers with all the hot button issues. Other groups should be collaborating with farmers in their outreach on these issues as this is who Canadians are looking to hear from. See full research report released on March 28, 2019 on www.foodintegrity.ca

Digital Ethnography – What Makes Food News and Information Credible? 2018

Objectives - CCFI research has revealed that when it comes to trust in the food system, Canadians make decisions based on shared beliefs rather than rational needs. Objectives: to provide insight into what makes food information credible; identify key consumer archetypes based on values, motivations, share of voice and influence; and to develop specific strategies to engage and increase trust with targeted segments.

Methodology - 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.

Outcomes - A new way of segmenting and engaging with Canadians through detailed belief-based archetypes based on common values along with population estimates and demographic details of each archetype.

Key Findings

- 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.
- Five belief-based archetypes were developed that fall along a 'truth spectrum'. On the far left are those who believe altruistic authorities are most credible (NGOs, charities, etc), in the center are those who believe the most popular authorities are the most credible (government and its associated bodies), and those on the far right believe that the most profitable social authorities are the most credible (large brands, celebrities).
- New social institutions are needed that will resonate strongly with a larger proportion of the population. Those that takes information from credible sources and seeks additional scientific rigour to validate and update the research, without a corporate interest or profit motives. 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.
- There is almost 20% of the population who want to hear from business and corporate perspectives on food and farming directly, with specific interest in economy and innovation.

For additional information:

Crystal Mackay
CCFI President
crystal@foodintegrity.ca

Kim McConnell, C.M.
CCFI Chair
Kim@KimMcConnell.ca