

How do we Earn Public Trust in Food and Farming with Canadian Consumers?

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■ Take Home Messages

- ▶ **Canadians want access to healthy affordable food:** The rising cost of food and keeping healthy food affordable have consistently been the top consumer concerns since our benchmark study in 2016. The entire food system can use this finding to guide their development of priorities, programs and communications. Agriculture and food need to be framed in a position of strength, delivering healthy affordable food as the most important concern to Canadians.
- ▶ **Trust and public goodwill cannot be taken for granted:** They can erode without long-term engagement and effort. In 2018 we saw a significant decrease in several key measures when it comes to public trust, such as humane treatment of animals and the overall direction of the food system. 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 first.** Our 2016 testing of the Consumer Trust Model in Canada shows that shared values is three to five 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 information; it is about demonstrating that you share their values when it comes to topics that matter to them. This is the roadmap to building public trust.
- ▶ **Turn up the transparency.** Our 2017 research taught us that transparency leads to trust. The 2018 transparency report card shows 'needs improvement'. 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. The food system must turn up the volume and engage around the good work being done to provide Canadians with balanced, credible information about agriculture and food.

■ **The Importance of Public Trust in the Food System and How to Earn it**

We all have opinions about food: how it's produced, what's in it, who's producing it and how it impacts our health. But how do we measure what consumers think? Who is setting trends and shaping attitudes about food and how do we best engage to earn trust? The research from the Canadian Centre for Food Integrity (CCFI) is set up to study this and share it with the entire food system.

The U.S. CFI has conducted annual consumer research related to public trust for a decade. The CCFI introduced this research to Canada in 2016 by testing the peer-reviewed and published public trust model and providing some unique North American perspectives with direct comparisons to the U.S. data.

The 2016 research provided a valuable benchmark for Canada's food system in the early days of embarking on new approaches and investments in building public trust. Our research also tracks consumer concerns and trending attitudes on topics ranging from food safety and animal welfare to attitudes about farming and trusted sources of information, some of which dates to 2006 for solid trend analysis. This investment in understanding public trust is a long-term commitment.

What have we learned? As our consumer trust model tells us, communicating and connecting with our shared values is the foundation for earning trust (Figure 1). Values are all about the why. This includes understanding where influencers connect online, emerging trends, trusted sources, and channels Canadians use to shape their beliefs and opinions about food and agriculture – information that provides the food system an opportunity to effectively engage with Canadians and balance the conversation.

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.

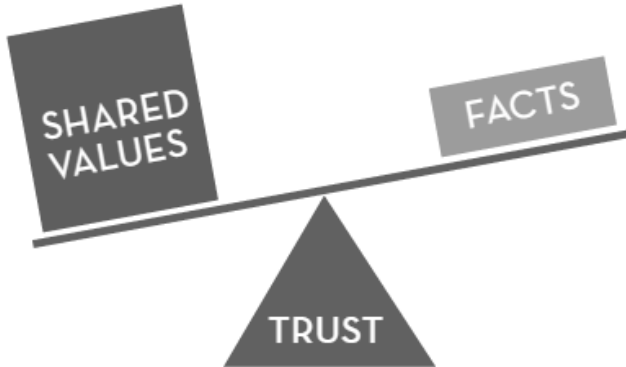


Figure 1. Leading with shared values is 3–5 times more important to building trust than sharing facts or demonstrating technical skills/expertise.

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. 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 public trust. Meaningful stakeholder engagement and effective values-based communication with Canadians is essential to maintaining the trust that protects social license.

■ **Trust-Building Transparency**

Companies and organizations must share information, both positive and negative, that is accurate, easily understood and relevant to consumers. Perhaps less obvious to some is the importance of open dialogue and engaging consumers, which will only continue to increase as personalized digital communication dominates the way consumers connect.

Consumers want to know if companies are listening, acknowledging their questions and feedback, and explaining how and why they make decisions. A commitment to engaging quickly and consistently is necessary to show that the company's motivations are aligned with consumers and that it is being transparent.

In 2017, CCFI research took a deep dive into transparency. What is the public looking for exactly and from whom? The research examined the seven elements of transparency across five key food system issues: food safety, animal welfare, environment, business ethics, and health (Figure 2).

Overall, our research shows there is a strong relationship between transparency and trust. Companies that are perceived by Canadians as providing the type and amount of information they are looking for, using language and terms that are easily understood so they can make informed decisions about their food, will be rewarded with higher levels of trust.



Figure 2. Seven elements of trust-building transparency.

More specifically, accuracy (accurate, reliable and complete information) is the element that is most strongly related to trust, followed by clarity (easy for consumers to understand), motivations (ethical principles guide behaviour), and disclosure (useful, timely and easy to find information, does not withhold damaging information, easy to understand). Companies should use these elements as guiding principles in their communication and outreach efforts in building public trust.

This work showed significant differences between Canadian and American consumers, with Canadians still valuing accuracy from credible sources.

Unfortunately, when we asked where they find their information on food, they are often not finding the credible sources.

■ Transparency – Whose Job Is It?

We know that all stakeholders in the food system play a role in providing information to their customers, as transparency demands transcend every ingredient in the supply chain. We asked consumers directly about this issue and who they view as most responsible for providing open and transparent information on how their food is grown or produced. Consumers hold the entire food system responsible for transparency—some more than others. Food processors/manufacturers are held the most responsible, followed by farmers and the government. Canadians expect transparent information from all food system players, solidifying the need for a whole food system approach for earning trust.

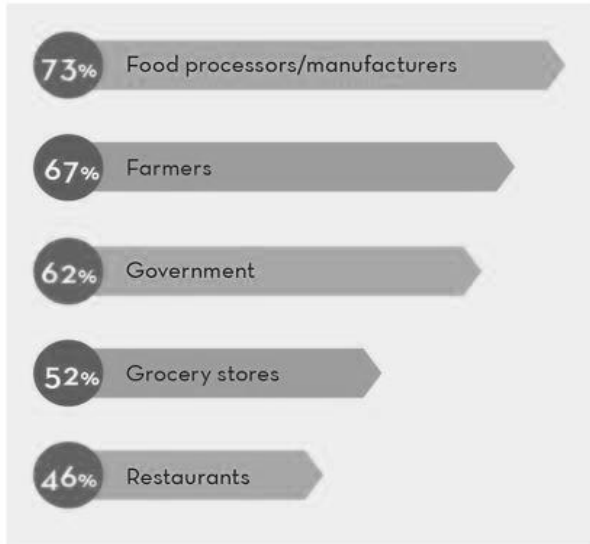


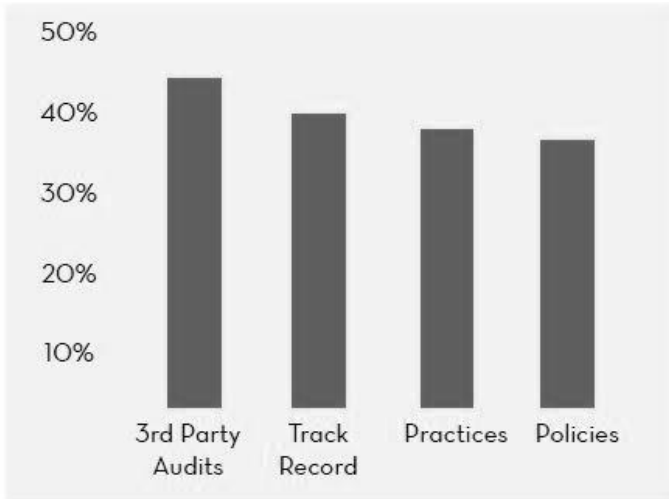
Figure 3. Responsibility for providing transparent information to Canadians about their food

■ Key Categories and Practices That Matter for Food Companies

To better understand the practices that consumers associate with demonstrating trust-building transparency in food companies specifically, Canadians were asked to rate a list of practices in five key food system areas:

food safety, environmental impact, animal well-being, labour and human rights, and business ethics.

Respondents were asked to rate the degree to which food company policies, practices, track record (performance) and third-party audits demonstrates transparency for each of the five areas above (Figure 4). About four in ten believe that providing information demonstrates transparency in all five key food system areas. Nearly half believe that being transparent in each area builds trust.



(n=1307)

Figure 4. How to demonstrate transparency. About four in ten Canadians gave an 8–10 strong agreement that providing the above information on the food company website demonstrates transparency across all five food system topics. This is similar but slightly lower than U.S. findings from 2015.

Policy is the way an organization articulates motivation and reflects its values. Practice is the way an organization demonstrates its commitment. Third party audits are an external function validating performance. Consumers are saying “show me your practices and explain to me how you’re verifying them.” Having policies that reflect consumer values, and practices that demonstrate them, will most likely lead to overcoming negative bias and building trust.

Some transparency activities are more important to consumers than others. For example, for food safety, CCFI’s research shows that identifying all ingredients in the food on the nutrition label, regardless of quantity, is a much stronger activity demonstrating transparency than providing safe handling

instructions on the package. A detailed analysis of these specific activities is available online in our ‘Talking Transparency’ webinar <http://www.foodintegrity.ca/education/webinars/>.



	Food Processors/ Food Mfgs.	Government	Farmers	Grocery Stores	Restaurants
Food Safety	1	2 (tie)	2 (tie)	3	4
Impact of Food Production on the Environment	2 (tie)	2 (tie)	1	3	4
Labour and Human Rights in Food Production	1 (tie)	1 (tie)	2	3	4
Treatment of Animals Raised for Food	2	3	1	4	5
Business Ethics in Food Production	1	2	3	4	5

Figure 5. Responsibility for transparency by key issue – Canada. Respondents allocated 100 points across the groups responsible for providing information in each transparency topic. The numbers shown above are the average number of points allocated to each group across all respondents.

When it comes to who is held responsible for demonstrating transparency by each of the key food system areas, we learned that consumers look to food manufacturers to provide transparency on food safety, followed by farmers and the government (Figure 5). Farmers are held the most responsible for demonstrating trust-building transparency when it comes to environmental impact and animal well-being.

American consumers, however, primarily hold food companies responsible for transparency on **all** key issues. American respondents did not have a ‘government’ option as a choice, so this comparison is not direct, but still insightful.

This study shows that consumers expect companies to be transparent about all five topics tested. Public trust in your products, your people, and your brands depends on it.

■ 2018 Public Trust Research – Access to Healthy, Affordable Food Remains Top Priority for Canadians While Other Opinions Wane

Every year, CCFI asks survey participants to rate their level of concern on several life issues, including broad areas like health care costs, unemployment, food safety and food affordability (Figure 6). 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? Agriculture and food need to be framed in a position of strength, delivering on the most important concern to Canadians.



Figure 6. 2018 Canadian top life concerns

After a significant increase last year, there is a significant decrease in the number of consumers who feel the food system is headed in the right direction – 36% compared with 43% in 2017 (Figure 7). 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.

2018 attitudes are now more in-line with American consumers than they've been in the past.

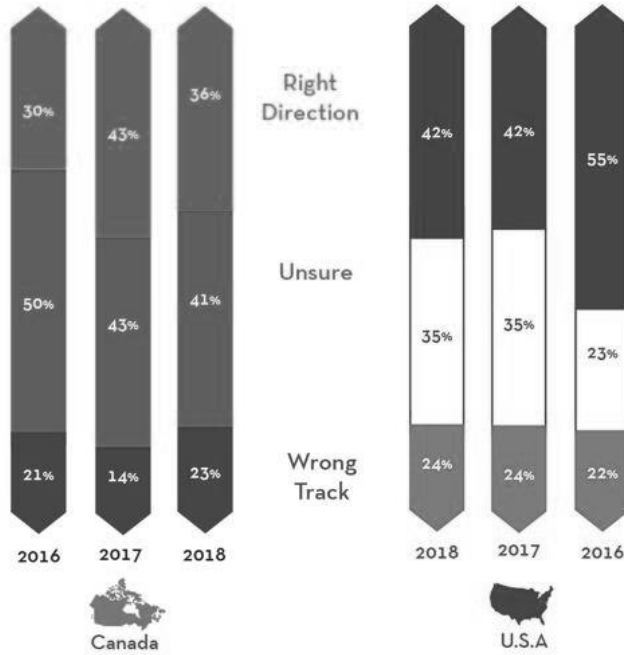


Figure 7. Direction of the food system

Canadians’ attitudes about Canadian agriculture are similarly declining (Figure 8). 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.

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 CCFI has 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.

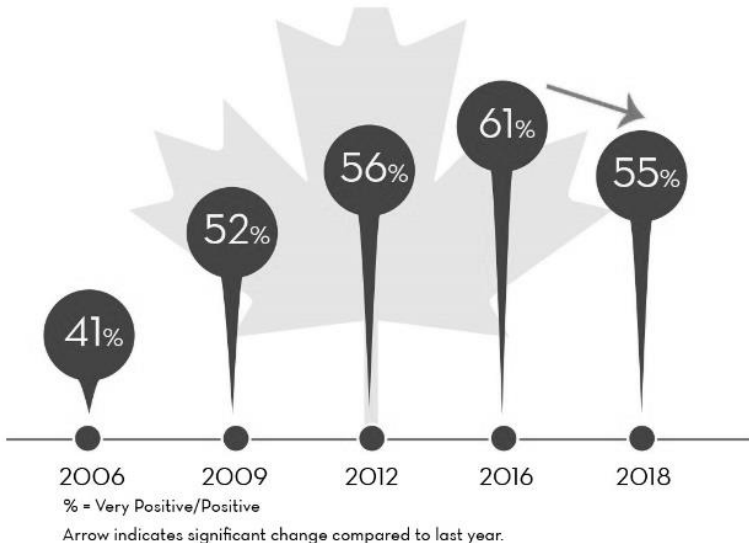


Figure 8. Attitudes about Canadian agriculture.

■ Perceptions on Humane Treatment of Animals in Canada – A Dangerous Disconnect

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 (Figure 9).

Overall concern for the humane treatment of farm animals is on the rise. Half of Canadians (49%) say they are very concerned about this issue, up from 40% in 2017 and 43% in 2016. Canadians are also 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.

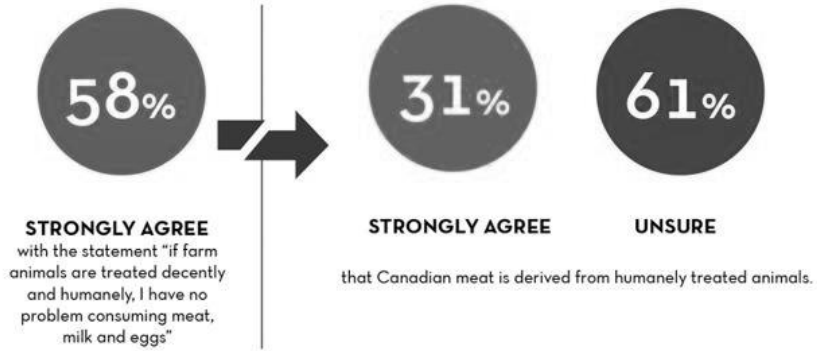


Figure 9. Perceptions on humane treatment of animals.

These 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 and credible voices, and listening to consumer concerns to address them most effectively.

■ **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. In 2018 we asked Canadians how well each of the food system players 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 were low, with 58–65% neutral (Figure 10).

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 are needed to help improve this transparency report card in the future.

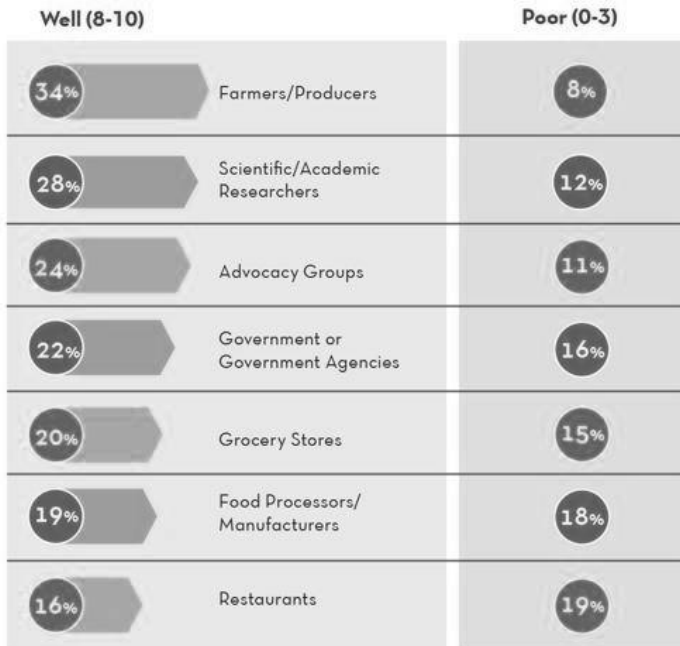


Figure 10. Food system ratings on providing consumers with transparent information

The CCFI has invested in an online resource, www.bestfoodfacts.org, that profiles third-party experts on everything about food and farming across all social media channels. This resource is meant to be shared by many across the food system to help them address consumer demand for credible information.

■ About the Canadian Centre for Food Integrity

The CCFI is a national charity with a vision to help Canada's food system earn trust by coordinating research, dialogue, resources and training.

The CCFI coordinates public trust research and resources for the benefit of the entire food system and those interested in conversations about food and how it's produced. A better understanding of Canadians' 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. This is the cornerstone of CCFI's programs with the vision to help Canada's food system earn trust.

Interested in learning more about these findings? Visit www.foodintegrity.ca to download summaries of the research reports and webinars from 2016, 2017, and 2018 in French or English.



