Agriculture and
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# 2020 Buy Canadian Promotion Campaign Baseline Survey — Final Report

Prepared for Agriculture and Agri-Food Canada

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For more information on this report, please contact Agriculture and Agri-Food Canada at:
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**Ce rapport est aussi disponible en français.**

Canada

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Supplier name: Earnscliffe Strategy Group
September 2020

This public opinion research report presents the results of a survey conducted by Earnscliffe Strategy Group on behalf of Agriculture and Agri-Food Canada. The research was conducted in July and August of 2020.



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# Summary

Earnscliffe Strategy Group (Earnscliffe) is pleased to present this report to Agriculture and Agri-Food Canada (AAFC) summarizing the results of the quantitative research that will act as a baseline measure to develop the Buy Canadian Promotion Campaign.

The 2019 Budget committed an investment of $25 million over five years for Agriculture and Agri-Food Canada (AAFC) to develop a national consumer focused campaign to better connect Canadians with and instill pride in, Canada's food system, its agriculture, food and seafood products. Also known as the Buy Canadian Promotion Campaign, the initiative was presented to the Treasury Board and included a tracking study which would monitor the effectiveness of the campaign, and to provide a better understanding of consumer preferences and reactions to the food sector.

The objectives of the research were to collect insights to be used to shape the initiative, as well as collect baseline data that would help establish benchmarks in order to track potential changes over the duration of the campaign. The contract value for this project was $74,950.19 including HST.

To meet these objectives, Earnscliffe conducted a comprehensive wave of quantitative research. The research was comprised of an online survey of 2,005 Canadians aged 18 and older who hold at least some of the household grocery buying responsibility.

The online survey was conducted using our data collection partner, Leger's, proprietary online panel. The survey was conducted from July 28, 2020 to August 3, 2020 in English and in French. The data was weighted to reflect the demographic composition of the Canadian population aged 18 and older. Because the online sample is based on those who initially self-selected for participation in the panel, no estimates of sampling error can be calculated, and the results cannot be described as statistically projectable to the target population. The treatment here of the non-probability sample is aligned with the Standards for the Conduct of Government of Canada Public Opinion Research for online surveys.

The key findings from the research are presented below.

- Most grocery shoppers (69%) indicated that they do all, or almost all, of the shopping for their households,while the other 31% of grocery shoppers do about half, or less than half.
  - The COVID-19 pandemic appears to have had little impact on roles, but it certainly has affected behaviours. The vast majority are taking precautions such as wearing a mask (82%) or using hand sanitizer (83%).

- Few indicate having any difficulty finding fresh foods, dairy products (94%), and eggs (91%) were the easiest to locate, while alcoholic beverages (66%), and fresh seafood (59%) were least (though 25% report never shopping for seafood products, and 24% said the same about alcoholic beverages). Of note, one in five (19%) shoppers found it difficult to locate pantry supplies when shopping for groceries.

- Relatedly, few grocery shoppers have any concerns about the availability of food, almost nine in ten grocery shoppers (88%) agree they were able to find most of the things they were looking for the last time they went grocery shopping.

- Further, four in five grocery shoppers (80%) trust that they will have enough food throughout the COVID-19 pandemic.

- Nearly all (95%) rely on in-person shopping at grocery stores however, that reliance has, if anything, temporarily decreased during the pandemic. Of note, the 5% who do not rely on in-person shopping at grocery stores rely primarily on online shopping and delivery from traditional grocery stores.
  - Shoppers report relying far less on farmers' markets (from 37% down to 14%) and specialty food stores (from 30% down to 17%) and more on online options, including online shopping and delivery from traditional grocery stores.

- Looking ahead, shoppers indicate going back to relying on farmers markets (41%) at least as much as before the pandemic and while they expect their use of online options will recede somewhat post-pandemic, they appear likely to be used more in the future than had been the case in the past.
  - Prior to COVID-19, 7% relied on online shopping from traditional grocery stores, and ordering online with express pick-up. Post COVID-19, these numbers grew to 13% ordering online from traditional grocery stores, and 14% utilising online ordering with express pick-up.
  - Claimed behaviours in terms of take-out and delivery options show little fluctuation or expected change in the future.
  - Presently, a third of shoppers (33%) order take-out from fast food or dine-in restaurants at least 2-4 times per month. Food delivery services were slightly less popular with roughly one in five (22%) using services such as Uber Eats and Skip the Dishes 2-4 times per month. Finally, less than one in ten (7%) shoppers receive meal kits/food boxes at least 2-4 times per month.

- The majority of shoppers (64%) spend $300 or more on groceries every month, including a third (32%) who spend $500 or more.

- Most (64%) are not following any particular diet, but one third are and tend to primarily be doing so to be healthier or lose weight.
  - Looking more closely at specialty diets, 5% are following plant-based diets, another 14% are following meat reduced diets, and 6% are following meat based diets. A quarter of shoppers (23%) are following other diets including but not limited to low carb, calorie reduced, and gluten free.

- Shoppers tend to hold favourable impressions of Canada's agriculture and food sector, with about three in four (72%) having very positive/positive views. Nearly two-thirds (63%) feel at least somewhat knowledgeable about it.

- Just over half (54%) feel at least somewhat familiar with farming/producing and significantly fewer (41%) feel as familiar with food and beverage processing.

- There is broad consensus around the importance of (87%), as well as pride and trust in food produced in Canada (77%).

- Most (73%) are concerned about the impact COVID-19 may have on Canadian farmers and only a third (30%) are convinced the Government of Canada is doing enough to help Canadian farmers.

- Respondents are far more likely to agree than disagree that they have faith in farmers' judgement and responsible behaviour when it comes to the environment (54% vs. 8% respectively) and antibiotics (52% vs. 13% respectively).

- Nevertheless, shoppers do have concerns.
  - Just over half (56%) are more concerned about genetically modified organism (GMO) foods today than they have been in the past. However, about half (46%) feel that scientists have a clear understanding of the health effects of GMO foods — a proportion that far outstrips the proportion who hold the opposite view.
  - Opinion is divided over whether pesticides are necessary (31% agree, 30% disagree).

- There is little concern (from 8% to 26% depending on food variety) over food availability being impacted by COVID-19.
  - Half of shoppers (51%) are concerned about food affordability in Canada, and an equal portion (52%) are concerned about the level of food waste due to disruptions caused by COVID-19.

- The option that would make shoppers most proud of Canada's agricultural sector would be producing healthy food (48% selected as a top 3 source of pride) and there being affordable food grown in Canada that is available year-round (44%).

- The most common sources for information on food and agriculture are journalists (45% selected as a top three source for information) documentaries (36%) and farmers (30%). Celebrity chefs (3%), oneself (1%), and Google (1%) are among the least common.

- When shopping for food, Canadians identify price (58%), and quality (53%) of food produced in Canada (50%) as the factors that matter most.

- Shoppers have very high impressions of the quality of the food and beverages produced in Canada.
  - A third of shoppers deem the quality of food produced/grown in Canada as excellent, and another 50% say the quality is good.

- Most (64%) agree Canadian grown/produced foods are better than imported foods.
  - Though a fifth (20%) would not be willing to pay more for foods/beverages grown/produced in Canada.

- Half (52%) of shoppers often or always look for food or beverages produced in Canada.
  - The majority (61%) find it easy to identify whether a food or beverage has been produced or grown in Canada.
  - When attempting to identify country of origin, alcoholic beverages are deemed the easiest (71%), fresh seafood the most difficult (41%).
  - Most shoppers use the labels (87%) or signs (46%) to identify origin.
  - Over half of shoppers always or often look specifically for meat (58%) and produce (62%) grown in Canada.

- The majority of shoppers (61%) think "best before date" and "expiration date" mean different things.

- In an effort to reduce the amount of food wasted in Canada, over half of shoppers would place the responsibility on grocery stores (60%), and restaurants (57%).
  - Two-thirds (64%) of shoppers feel reducing food waste in their household is very important.
  - The main cause for household food waste was food going bad (58%).

Research Firm:
Earnscliffe Strategy Group Inc. (Earnscliffe)
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Contract award date: August 20, 2020

I hereby certify as a Representative of Earnscliffe Strategy Group that the final deliverables fully comply with the Government of Canada political neutrality requirements outlined in the Communications Policy of the Government of Canada and Procedures for Planning and Contracting Public Opinion Research. Specifically, the deliverables do not include information on electoral voting intentions, political party preferences, standings with the electorate, or ratings of the performance of a political party or its leaders.

Signed: : September 29, 2020

Stephanie Constable
Principal, Earnscliffe

# Introduction

Earnscliffe Strategy Group (Earnscliffe) is pleased to present this report to Agriculture and Agri-Food Canada (AAFC) summarizing the results of the quantitative research that will act as a baseline measure to develop the Buy Canadian Promotion Campaign.

The 2019 Budget committed an investment of $25 million over five years for Agriculture and Agri-Food Canada (AAFC) to develop a national consumer focused campaign to better connect Canadians with and instill pride in, Canada's food system, its agriculture, food and seafood products. Also known as the Buy Canadian Promotion Campaign, the initiative was presented to the Treasury Board and included a tracking study which would monitor the effectiveness of the campaign and provide a better understanding of consumer preferences and reactions to the food sector.

The objectives of the research were to both inform the initiative and to establish a baseline measure to track changes in opinion over the course of the campaign. More specifically, the research sought to provide AAFC with insights on:

- Pride in Canadian agriculture, food system and food products, including top of mind Canadian foods, regional differences, and pride in certain food products;
- Understanding of the terms, "local", "Made in Canada" and "Product of Canada";
- What influences consumers' decisions to buy Canadian food and what would encourage them to buy more Canadian food (for example price, product type, food safety, labelling/marketing, quality and environmental considerations); and
- Views on food policy, including more data to support Canada's commitment to reduce food waste, such as: perceived roles and responsibilities for reducing food waste and what measures consumers are willing to take to reduce food waste.

The research will be used to inform the initiative, as well as collect baseline data that would help establish benchmarks in order to track potential changes over the duration of the campaign.

To meet these objectives, Earnscliffe conducted a comprehensive wave of quantitative research.

## Approach

The research was comprised of a quantitative online survey of 2,005 Canadians aged 18 and older who hold at least some of the household grocery buying responsibility. The online survey was conducted using our data collection partner, Leger's, proprietary online panel. The survey was conducted from July 28, 2020 to August 3, 2020 in English and in French. The data was weighted to reflect the demographic composition of the Canadian population aged 18 and older. Because the online sample is based on those who initially self-selected for participation in the panel, no estimates of sampling error can be calculated, and the results cannot be described as statistically projectable to the target population. The treatment here of the non-probability sample is aligned with the Standards for the Conduct of Government of Canada Public Opinion Research for online surveys.

# Detailed findings

The report is divided into four sections: consumer shopping habits, food sector, Canadian food, and food policy. Except where specifically identified, the findings represent the combined results regardless of audience, location or language (English and French). Due to rounding, results may not always add to 100%. Please refer to Appendix A for the methodology report, and Appendix B for the questionnaire used throughout the research.

## Section A: Consumer Shopping Habits

This section covers consumer grocery shopping frequency, the effects of COVID-19 on grocery shopping, methods of grocery shopping, alternatives to grocery shopping, average amount spent grocery shopping, and specialty diets.

First, shoppers were asked about their current grocery shopping habits, their shopping habits prior to the COVID-19 pandemic, and their expectations for the future. At present, most grocery shoppers (69%) do all or almost all of the shopping for their household, which is only 3% more than those who did all or most of the grocery shopping prior to COVID-19 (66%). Less than a third (32%) of grocery shoppers do about half, or less than half of the grocery shopping, which is slightly less than those who do about half or less than half of the grocery shopping during COVID-19 (34%). Two-thirds of shoppers (65%) have been grocery shopping within the last few days. When grocery shopping, the vast majority are taking precautions such as wearing a mask (82%) or using hand sanitizer (83%).

Significant demographic differences include:

- Women are significantly more likely to do the all of the grocery shopping compared to men (52% and 36% respectively). This holds true with shoppers' pre-COVID behaviours as well (51% and 33% respectively).
- Women are also significantly more likely than men to wear non-medical masks (84% and 79% respectively), use hand sanitizer (86% and 80% respectively), wipe down groceries with disinfectant (37% and 33% respectively), and buy groceries for someone not in their household (22% and 17% respectively).
- Roughly half of shoppers aged 35 to 54 and 55+ do all of the grocery shopping for the household (48% and 47% respectively), compared to about a quarter (26%) of those aged 18-24.
- The younger 18-24 year-old cohort is the most likely to wipe down groceries with disinfectant (44%), while those aged 25 to 34 and 35-54 are the most likely to buy groceries for someone not in their household (both 23%). Finally, those aged 55+ are significantly more likely to bring their own bags (62%).
- Non-medical mask wearing is almost universal among Ontario residents (92%) and Quebec residents (91%). In contrast, roughly half of those living in Manitoba/Saskatchewan (54%) wear non-medical masks when grocery shopping.
- Ontario and Quebec residents are also significantly more likely to take other precautions such as using extra hand sanitizer (82% and 90% respectively), bringing their own bags (58% and 69% respectively), and wiping down groceries with disinfectant (38% and 37% respectively).
- Those with college or university level education are more likely to wear non-medical masks while grocery shopping compared to those with a high school level of education or less (87% among post-grads and 83% among those with college or university degrees vs. 78% among those with high school or less). Those with college degrees or bachelor's degrees are significantly more likely than those with a high school level education or less to use extra hand sanitizer (86% vs. 78%) and buy groceries for someone not in their households (22% vs. 14%).
- Shoppers earning household incomes of less than $40,000 are significantly more likely than those who earn over $100,000 to do all of the household grocery shopping (65% and 28% respectively).

Exhibit A1: Q4 – How much of your household's grocery shopping do you do? Base = 2005

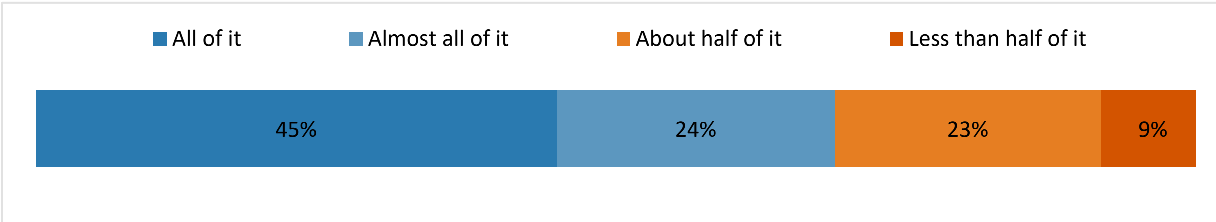



Exhibit A2: Q5 – For some people, grocery shopping frequency or habits have changed since the COVID-19 pandemic. Before COVID-19, how much of your household's grocery shopping would you typically do? Base = 2005

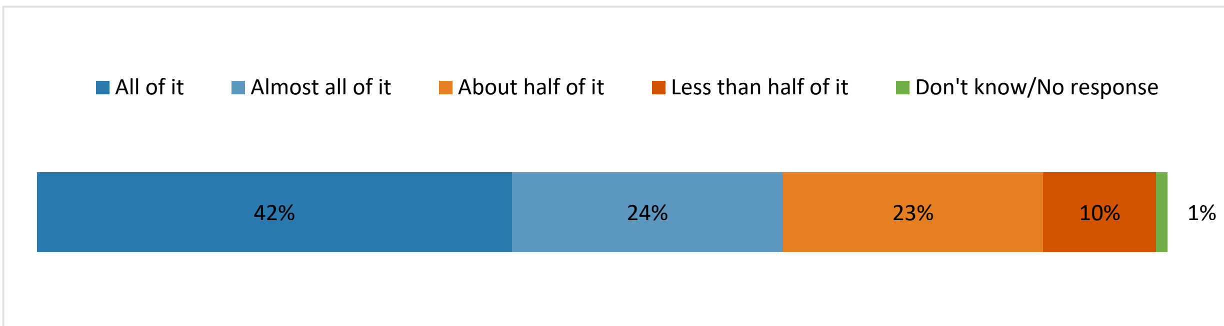



Exhibit A3: Q6 – When was the last time you went shopping for groceries? Base = 2005

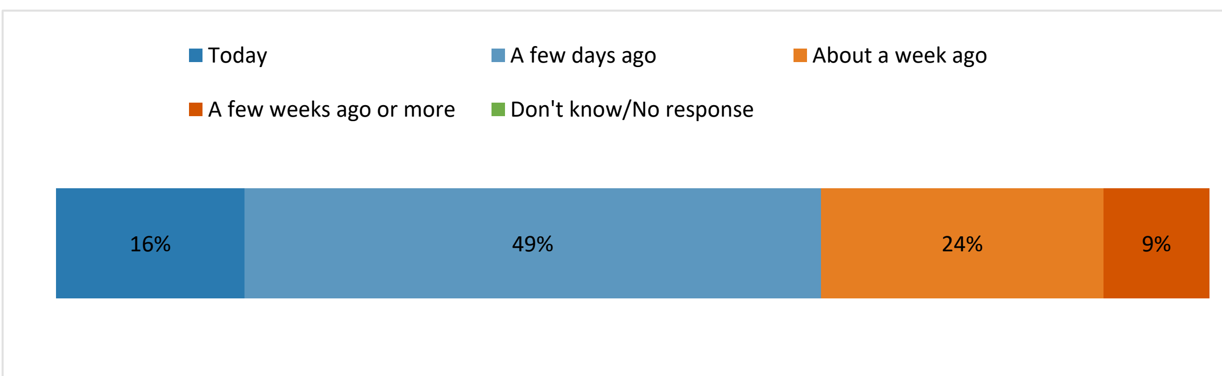
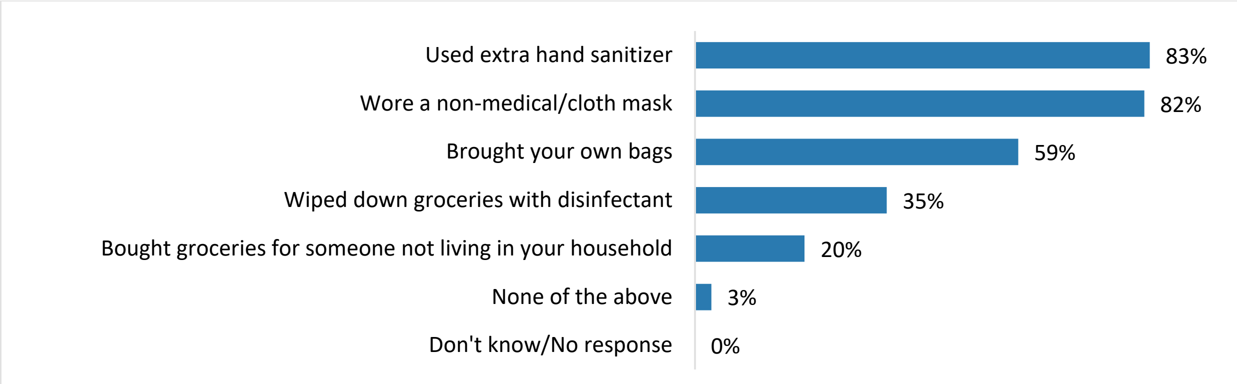


Exhibit A4: Q7 – When grocery shopping in-store during the COVID-19 pandemic, have you done any of the following? Please select all that apply. Base = 2005




Few grocery shoppers indicate having any difficulty finding fresh foods (from 4% to 8%), although about one-fifth (19%) do report having had difficulty finding pantry items. The easiest items to find in the grocery store are dairy products (94%), and fresh produce (92%), followed closely by eggs (91%), packaged foods (88%), and fresh meat (85%). A quarter of grocery shoppers never shop for seafood (25%), and an almost equal portion (24%) never shop for alcoholic beverages.

Relatedly, few grocery shoppers have any concerns about the availability of food, almost nine in ten grocery shoppers (88%) agree they were able to find most of the things they were looking for the last time they went grocery shopping. Further, four in five grocery shoppers (80%) trust that Canada's food supply will have enough food for Canadians throughout the COVID-19 pandemic.

Responses across all demographics are fairly consistent, with minimal significant differences.

Exhibit A5: Q8 – The last time you went shopping for groceries, how easy or difficult was it to find each of the following items? Base = 2005

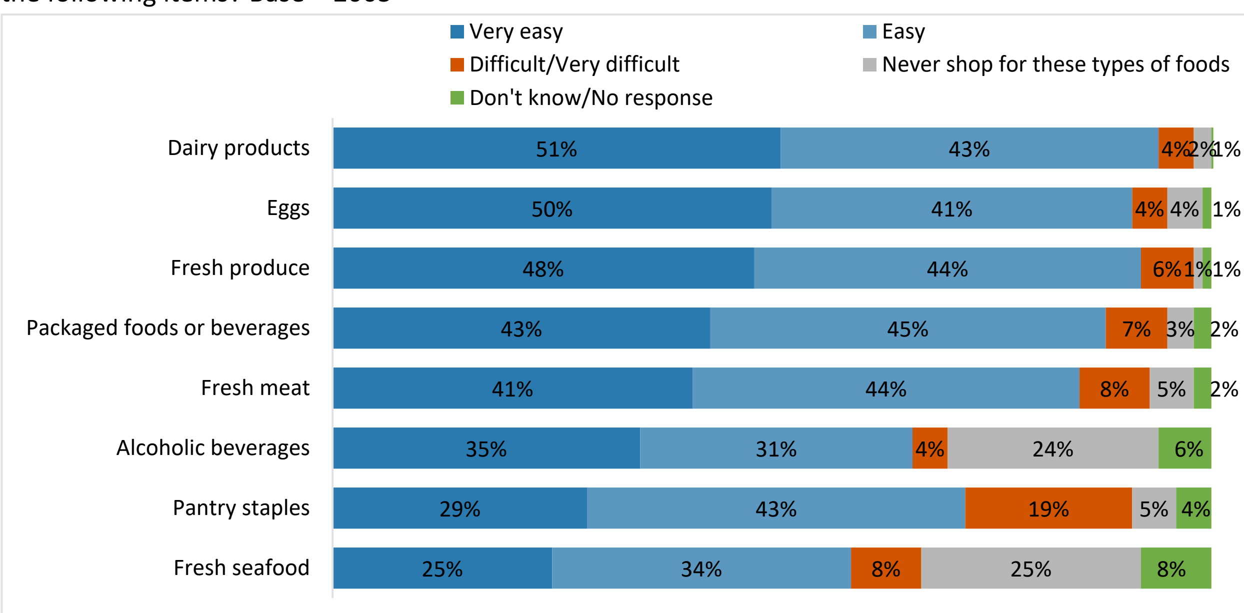
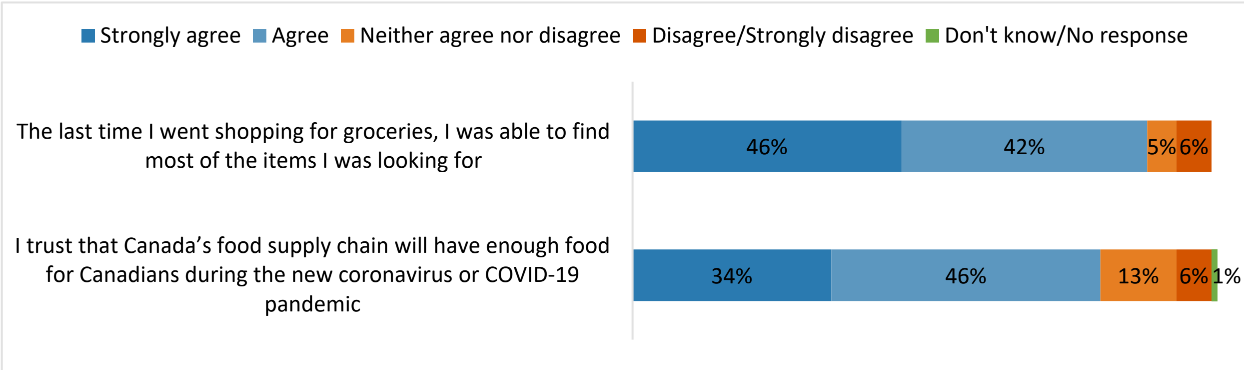


Exhibit A6: Q9 – To what extent do you agree or disagree with the following statements? Base = 2005




In terms of methods to conduct grocery shopping, habits have remained fairly consistent throughout the pandemic. In person shopping at a grocery store remains by far the preferred method of acquiring groceries, despite the percentage who say they shop there during the pandemic declining slightly. Virtually all grocery shoppers say they shopped in-person at grocery stores before the pandemic (95%) while 86% say they have done so during the pandemic. However, this drop seems only temporary, as 92% of shoppers think they will shop in-person at grocery stores in the future.

Prior to COVID-19, roughly a third of shoppers report having relied on farmers' markets (37%) and specialty food stores (30%). Less than one in ten opted for Community Supported Agriculture (CSA) programs (9%), online grocery stores (7%) express pick-up (7%), and online delivery services (5%). However, during the pandemic, shoppers have begun to rely more heavily on online shopping from grocery stores (19%), and express pick-up (18%), and much less on farmers' markets (14%), and specialty food stores (17%). While grocery shoppers expect to resume shopping at farmers' markets (41%), and specialty food stores (28%) when the pandemic is over the amount of people who feel they will continue to use online shopping (13%) and express pick-up (14%) from traditional grocery stores has doubled compared to prior to COVID-19.

Some notable demographic differences include:

- Prior to COVID-19 women are more likely than men to say they shopped at grocery stores (96% vs. 93%), farmers' markets (40% vs. 35%), and specialty food stores (33% vs. 26%), while men are more likely than women to say they used online grocery shopping from traditional grocery stores (9% vs. 5%), and online food box delivery (7% vs. 4%).
- There are no significant differences between men and women in terms of where they currently shop, however looking to the future, women are more likely than men to shop in grocery stores (94% vs. 90%), farmers' markets (44% vs. 39%), and specialty stores (30% vs. 25%).
- Thinking back to before the pandemic began, shoppers aged 35-54, and 55+ were more likely than the younger cohorts to go to grocery stores (both 96% compared to 90% among those aged 18 to 24). Younger shoppers aged 25-34 are most likely to say they used online grocery stores before the pandemic (13%), and food delivery boxes (11%). Finally, the youngest age bracket (18-24) were the most likely to have used express pick-up (13%) prior to the pandemic. These differences are consistent with current habits, and future intentions after COVID-19, though the percentages themselves do fluctuate.
- When reflecting on habits prior to COVID-19, B.C. residents are significantly more likely than those living in other provinces to claim they utilized online grocery shopping and delivery from traditional grocery stores (12%). Those living in Quebec are significantly more likely than others previously to order their food directly from a farm or farmer (12%). A third of Ontario and B.C. residents say that they

shopped at specialty food stores (33% each), while only 15% of Atlantic Canadian residents say the same.

- Looking at the future, shoppers living in urban areas are significantly more likely to use food boxes (9% compared to 6% in suburban and 4% in rural areas), and specialty food stores (31% vs. 21% among those in rural areas). Those living in rural areas are significantly more likely to order food directly from farmers (21%) compared to those in suburban (13%) and rural (10%) areas.
- Presently, post-graduates are significantly more likely than those who have completed or partially completed high school to use online delivery from grocery stores (24% and 15% respectively), express pick-up (25% and 9% respectively), specialty food stores (25% and 16% respectively), and food boxes (11% and 3% respectively).
- Parents are significantly more likely than those without children to currently use express pick-up (28% vs. 16%), or food boxes (11% vs. 7%), while those without children are more likely to use grocery stores (89% vs. 81%), or farmers' markets (17% vs. 10%).
- Students are significantly more likely than their counterparts to order online groceries from traditional grocery stores (38%). Those working full-time are four times more likely to use food boxes compared to those not in the work force (12% vs. 3%).

Respondents were asked to indicate all of the ways they conducted grocery shopping prior to COVID-19; all of the ways they conducted grocery shopping prior to COVID-19; and, all of the ways they expect they will conduct grocery shopping when the COVID-19 pandemic is over.

Exhibit A7: Q10A – For each of the following possible ways to conduct grocery shopping, please indicate all of the ways you conducted grocery shopping prior to COVID-19. Please select all that apply. Base = 2005

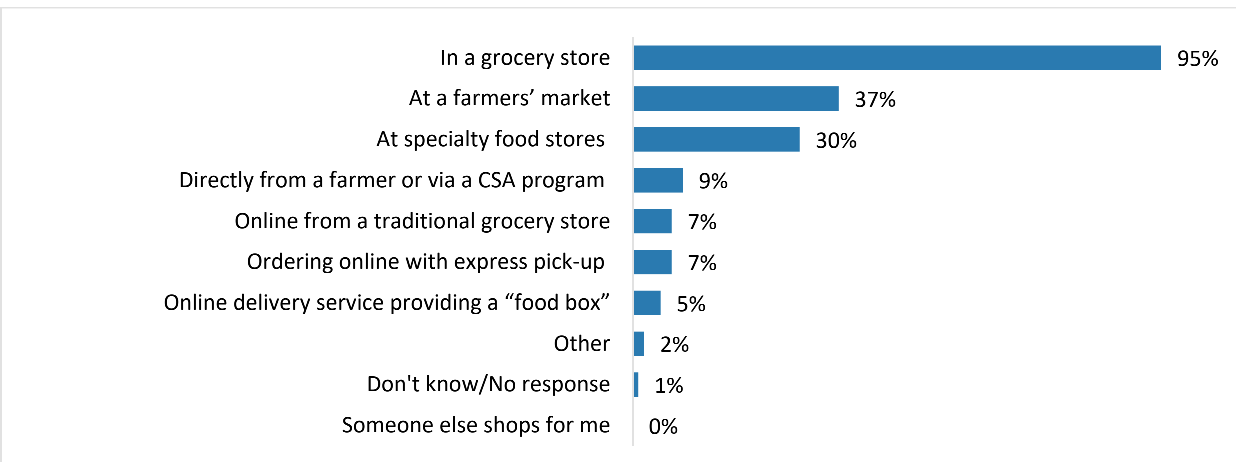


Exhibit A8: Q10B – For each of the following possible ways to conduct grocery shopping, please indicate all of the ways you have conducted grocery shopping during COVID-19. Please select all that apply. Base = 2005

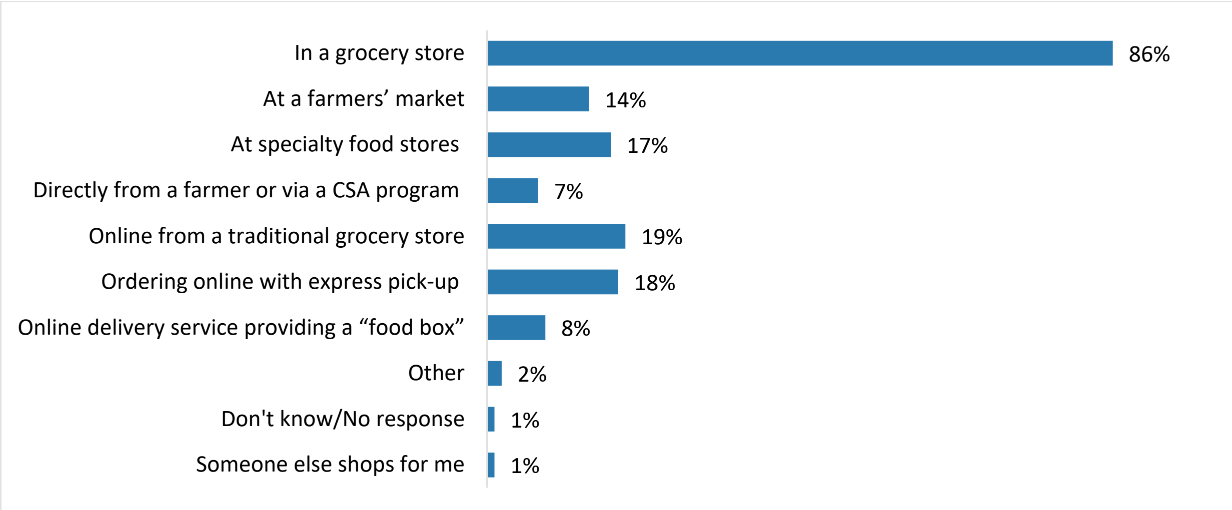
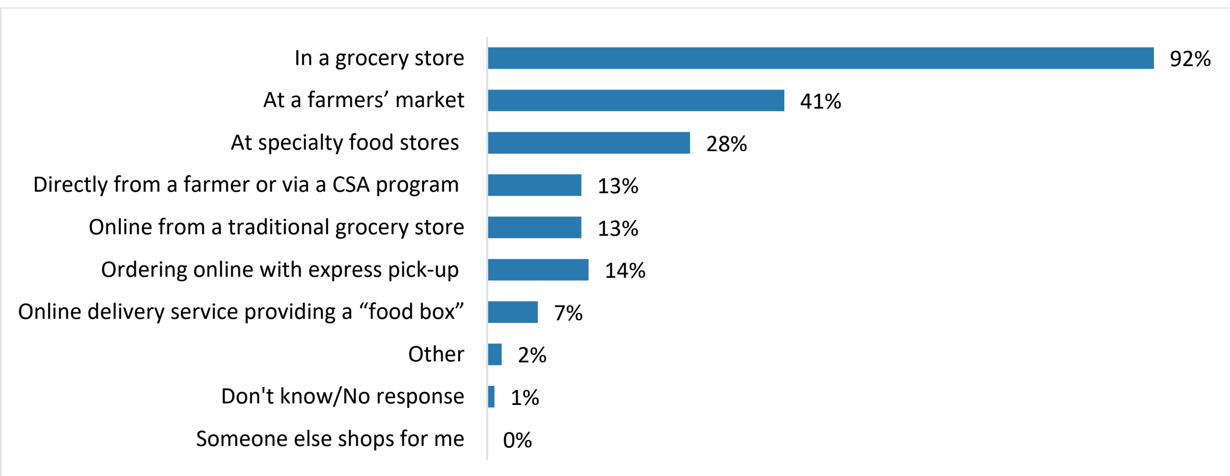



Exhibit A9: Q10C – For each of the following possible ways to conduct grocery shopping, please indicate all the ways you expect you will conduct grocery shopping when the COVID-19 pandemic is over. Please select all that apply. Base = 2005




When thinking of alternatives to grocery shopping such as take-out, food delivery services, and meal kits, responses are fairly uniform prior to COVID-19, during and expected future use. Presently, a third of grocery shoppers (33%) order take-out from fast food or dine-in restaurants at least 2-4 times per month, while one in two (49%) do so once a month or less. Food delivery services are slightly less popular with roughly one in four (22%) using services such as Uber Eats and Skip the Dishes 2-4 times per month. Finally, one in five (19%) shoppers order food boxes like HelloFresh and Goodfood at least once a month or less.

Some notable demographic differences concerning shoppers' present alternatives to grocery shopping intentions include:

- Men are significantly more likely than women to receive food box/meal kits at least 2-4 times a month (9% vs. 5%), or order take-out from fast food places or restaurants (36% vs. 31%).
- Almost one in ten shoppers aged 18-24 (9%) receive food box/meal kits at least 2-4 times month, whereas a mere 1% of shoppers 55+ say the same. Shoppers aged 25-34 are four times more likely to use food delivery services such as Uber Eats compared to those 55+ (43% vs. 11%). Finally, those aged 18-25 are just under twice as likely to order take-out compared to older shoppers 55+ (41% and 24% respectively).
- Ontario and B.C. residents are significantly more likely than shoppers from other regions to receive food boxes (both 9%), use food delivery services (26% and 23%), and order take-out (38% and 39% respectively).
- Shoppers living in urban areas are twice as likely to receive a food box/meal kit 2-4 times a month compared to those living in rural areas (9% vs. 4%). Further, these individuals are four times more likely to use food delivery services (29% vs. 7% respectively), and 12 percentage points more likely to order take-out (36% and 24% respectively).
- Those with post-graduate degrees (10%) are more likely than those with a high school education or less (4%) to receive meal kits (10%) at least 2-4 times a month.
- Parents are significantly more likely than those without children to receive food boxes/meal kits (11% vs. 5%), use food delivery services (29% vs. 21%), and order take-out (43% vs. 32%).
- Lastly, those working full time are the most likely to order meal kits (11%) and take-out (40%), while students are the most likely to use food delivery services (35%).

Exhibit A10: Q11 – Prior to the COVID-19 pandemic, how often, if at all, did you do each of the following in a typical month? Base = 2005

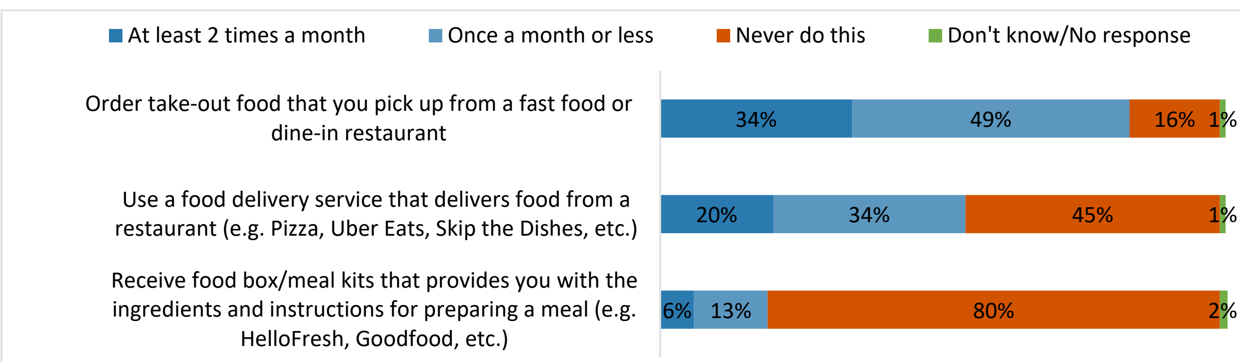


Exhibit A11: Q12 – During the COVID-19 pandemic, how often, if at all, did you do each of the following in a typical month? Base = 2005

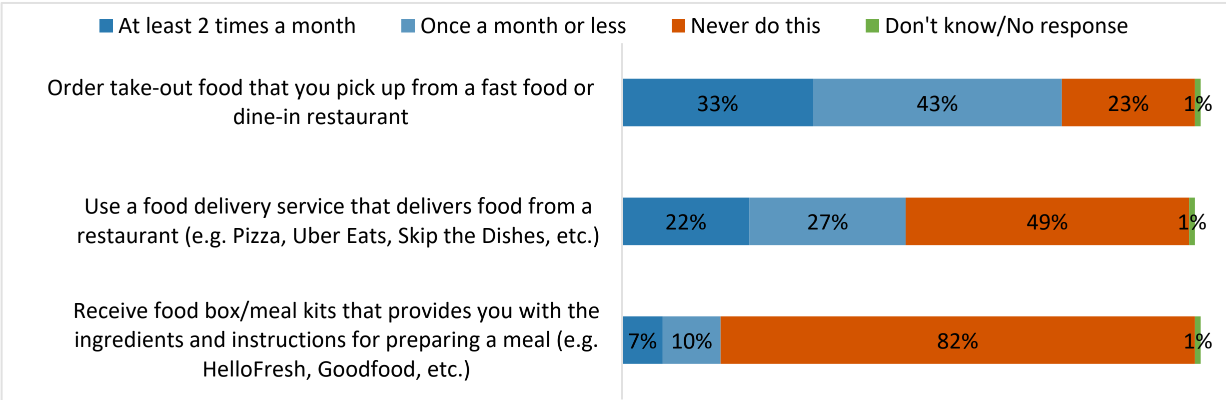
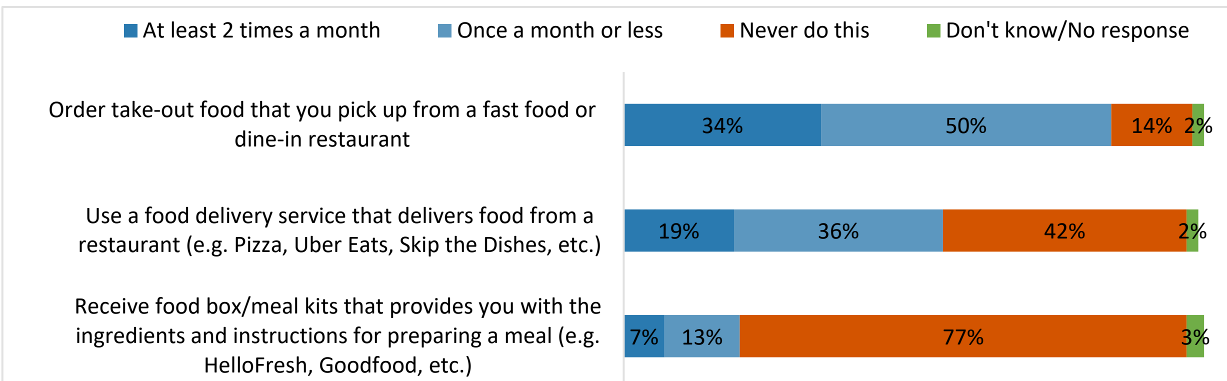
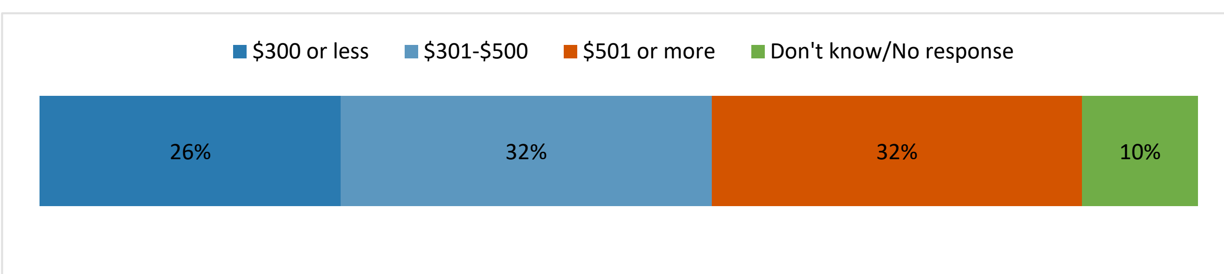



Exhibit A12: Q13 – Once the COVID-19 pandemic is over, how often, if at all, do you do expect you will do each of the following in a typical month? Base = 2005




In a typical month the majority of shoppers (64%) spend $300 or more on groceries, while nearly a third (32%) spend $500 or more. Responses across all demographics are fairly consistent, with minimal significant differences.

Exhibit A13: Q14 – How much would you estimate your household spends on groceries in a typical month? Base = 2005




Almost two-thirds (64%) of grocery shoppers are not following any particular diet. That said, 5% of shoppers are following plant-based diets (vegan and vegetarian), another 14% are following reduced meat diets (raw, pescatarian, Mediterranean, flexitarian, and climatarian), 6% are following meat based diets (keto and carnivore), and roughly a quarter (23%) are following other diets (low-carbohydrates, calorie reduced, intermittent fasting, gluten free and dairy-free).

There were two main factors consistently ranked among the top three aspects that motivate shoppers to follow a specialty diet; getting healthier (76%) and losing weight (59%). Nearly two in five (38%) following plant based diets do so because they believe it is healthier, while over a quarter (28%) do so because of the treatment of animals. The plurality of those following meat based diets do so to lose weight (42%), though 31% do so as they believe they are healthier. One in ten shoppers following reduced meat diets (9%) do so to try and reduce environmental impacts. Finally, two in five shoppers (40%) following other specialty diets do so to try and lose weight.

With regards to specialty diets significant demographic differences to note include:

- Overall women are significantly more likely to follow a specialty diet than men (37% compared to 33%). The single exception to this would be a meat based 'carnivore' diet, which men are more likely than women to follow (4% and 2% respectively).
- Men are significantly more likely than women to follow a specialty diet primarily because they think it is healthier (40% and 27% respectively). In contrast, women are significantly more likely than men to do so primarily due to food allergies/intolerances (17% and 10% respectively).
- Grocery shoppers aged 55+ are the least likely to follow any of the specialty diets (27%) compared to those aged 35-54 (38%), 25-34 (43%), and 18-24 (44%).
- With regards to age there are several differences among the top ranked motivations to follow a specific diet. Two in five shoppers aged 55+ (42%) follow specialty diets primarily because they are healthier, which is significantly higher than those aged 35-54 (31%), 25-34 (29%), and 18-24 (26%). Shoppers aged 35-54 are significantly more motivated to follow a specialty diet to try and lose weight (37%) compared to those 55+ (27%). Those aged 25-34 are significantly more likely to follow a specialty diet because of the treatment of animals (15%) compared to those 35 to 54 (8%) and 55+ (6%). Finally, those aged 18-24 are the most likely to follow a diet because they are trying to reduce environmental impacts (15%).
- Quebec residents are significantly more likely than those living in other provinces to follow the carnivore diet (5%), while those living in Manitoba/Saskatchewan are more likely than other to follow a vegan (7%) or raw (4%) diet.
- Shoppers living in Atlantic Canada (21%) are four times more likely to list food intolerance/allergy as the top motivation compared to those living in Manitoba/Saskatchewan (5%). Quebec residents (11%) are more than twice as likely than those living in any other province (between 0% and 5%) to follow a diet because they are trying to reduce environmental impacts.
- Grocery shoppers living in urban areas are significantly more likely to follow a speciality diet primarily because of the treatment of animals compared to those living in suburban or rural areas (12%, 8%, and 3% respectively).

Exhibit A14: Q15 – Which, if any, of the following diets are you currently following? Please select all that apply. Base = 2005

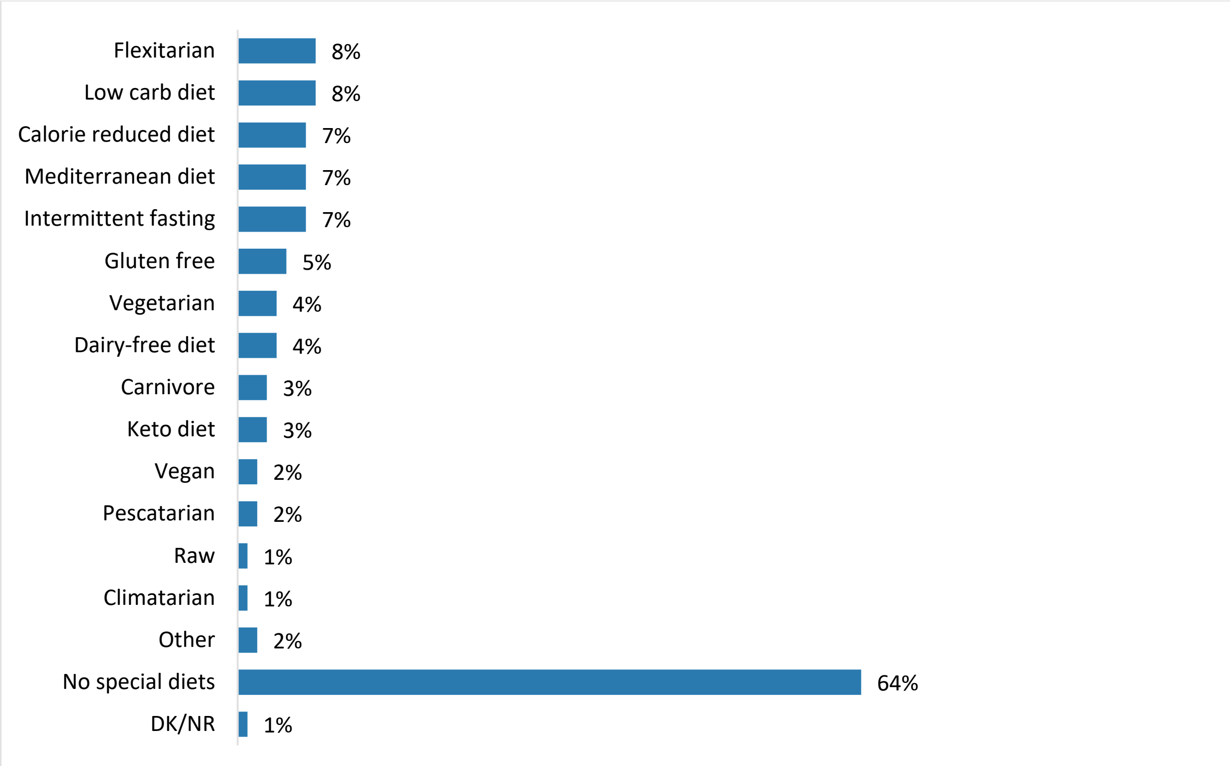



Exhibit A15: Q15 – Which, if any, of the following diets are you currently following? Base = 2005

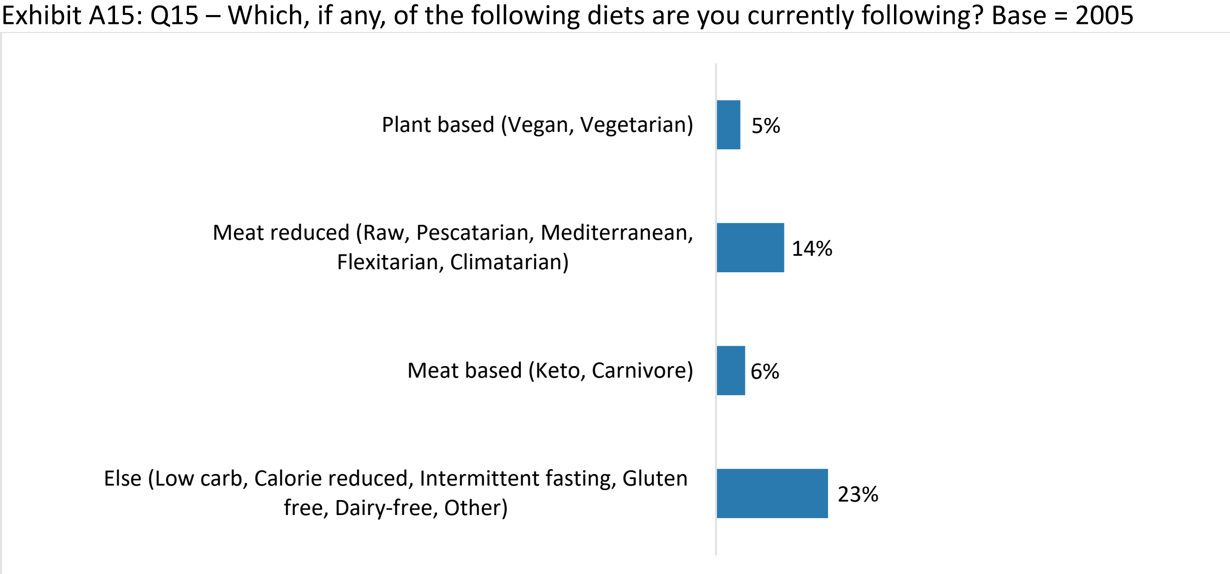


Exhibit A16: Q16 – Please rank the statements below based on what the main reasons you are following a specific diet are? (Sum of top three) Base = 2005

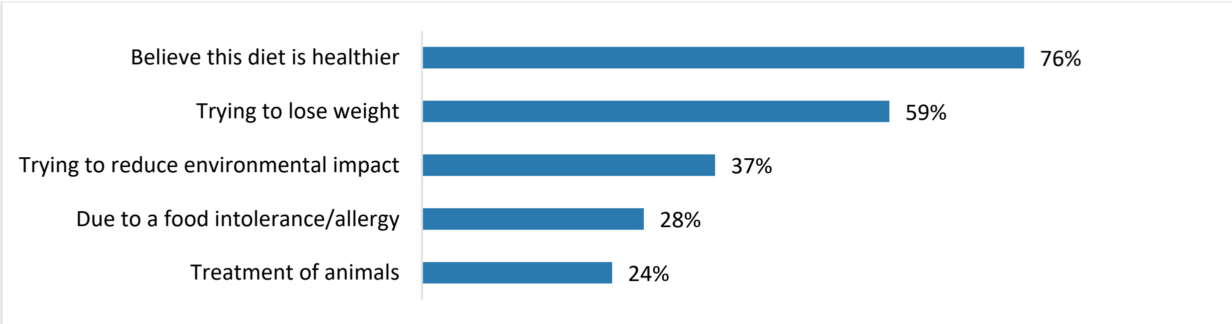
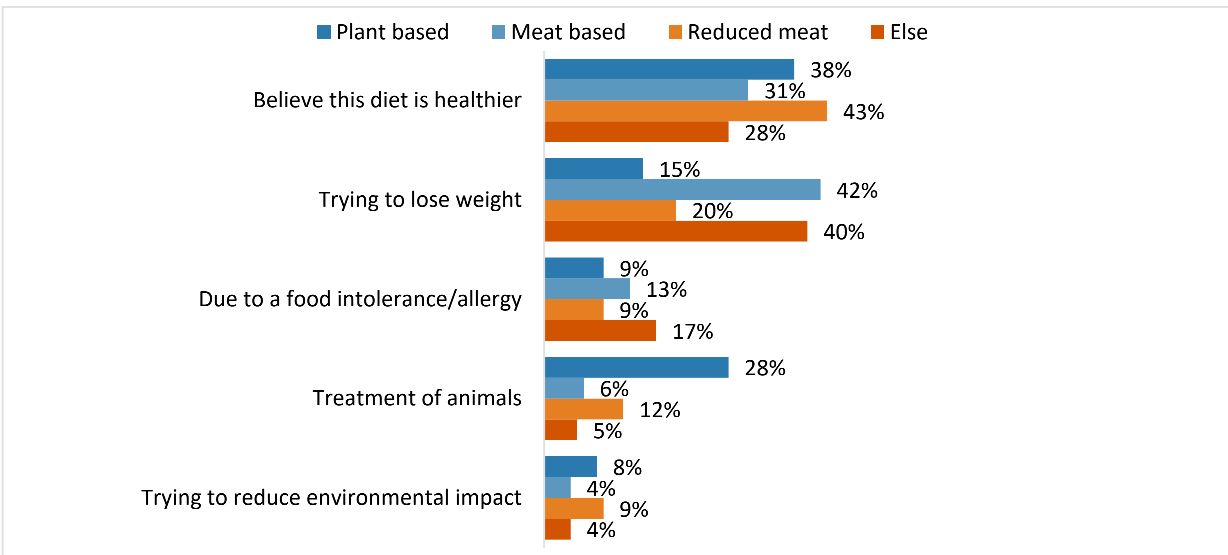



Exhibit A17: Q15 X Q16 – Please rank the statements below based on what the main reasons you are following a specific diet are? Base = 704



## Section B: Food Sector

This section addresses grocery shoppers' impressions, knowledge, and familiarity with Canada's agriculture and food sector. As well as sources of concern, pride, and information relating to Canada's food and agriculture.

Almost three in four grocery shoppers (72%) have a positive impression of Canada's agriculture and food sector. Nearly two-thirds (63%) feel they are very or somewhat knowledgeable about Canada's agriculture and food sector. Over half of shoppers feel they are at least somewhat familiar with Canada's food and agriculture sector's farming and producing (54%), slightly fewer feel they are at least somewhat familiar with food and beverage processing (42%).

Important demographic differences to note include:

- Men feel significantly more positively about Canada's food and agriculture sector than women do (74% vs. 69%). Men also feel they are more knowledgeable (68%), and familiar with farming/producing (59%), and food and beverage processing (49%) compared to women (59%, 50%, and 35% respectively).
- Older shoppers aged 55+ (81%) and 35-54 (71%) are significantly more likely to feel positively about Canada's agriculture and food sector compared to those 18-24 (64%) and 25-34 (56%).
- Almost three-quarters of shoppers aged 55+ (73%) feel they are very or somewhat knowledgeable about the sector. This is significantly higher compared to two-thirds of those aged 35-54 (64%), and about half of shoppers aged 25-34 (50%) and 18-24 (49%).
- Older shoppers are also more likely to feel they are familiar with farming/producing (60%) and food and beverage processing (44%) than their younger cohorts.
- Quebec residents are significantly less likely than any other province to feel knowledgeable about Canada's food and agriculture sector (55%). Further they are the least likely to feel familiar about farming and producing (29%, with at least 54% among all other provinces) or food and beverage processing (21% with at least 40% among all other provinces).
- Indigenous shoppers are significantly more likely to feel positively about Canada's food and agriculture sector (84%, 12 percentage points higher than the total sample), to feel knowledgeable about the sector (74%, 11 percentage points higher than the total sample), and to feel familiar with farming/producing (67%) or food and beverage processing (57%).
- Post-graduates are significantly more likely than those who completed or partially completed high school to feel familiar about farming and producing (63% vs. 51%) or food and beverage processing (48% vs. 39%).

Exhibit B1: Q17 – Generally speaking, what is your overall impression of Canada's agriculture and food sector? Base = 2005

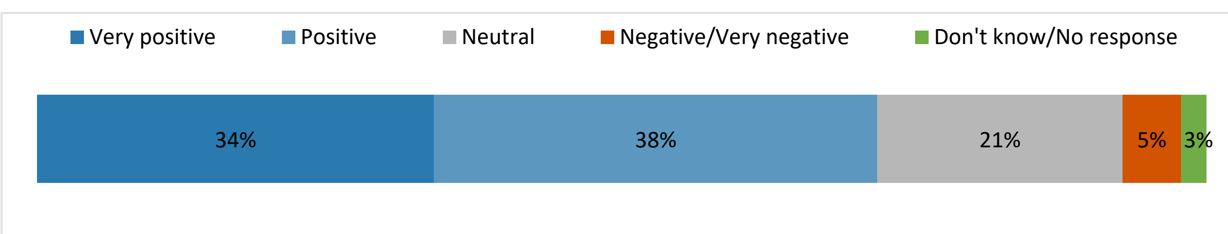


Exhibit B2: Q18 – Generally speaking, how knowledgeable do you feel you are about Canada's agriculture and food sector? Base = 2005

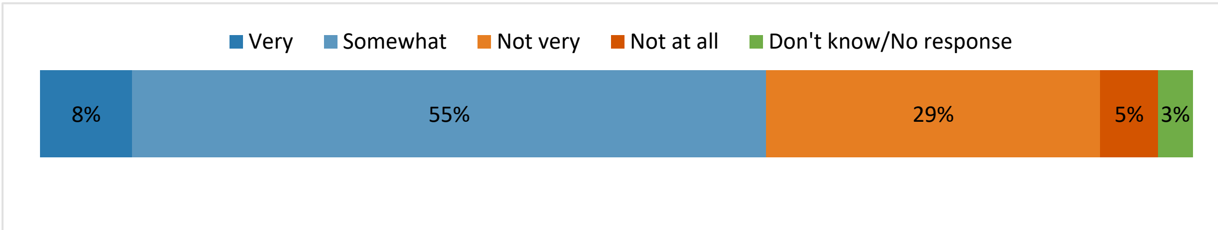
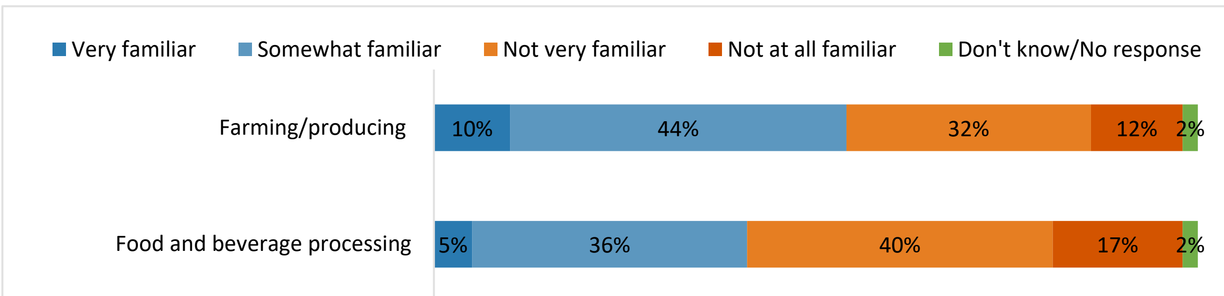



Exhibit B3: Q19 – Canada's agriculture and food sector includes farming/producing and food and beverage processing. How familiar would you say you are with each of the following? Base = 2005



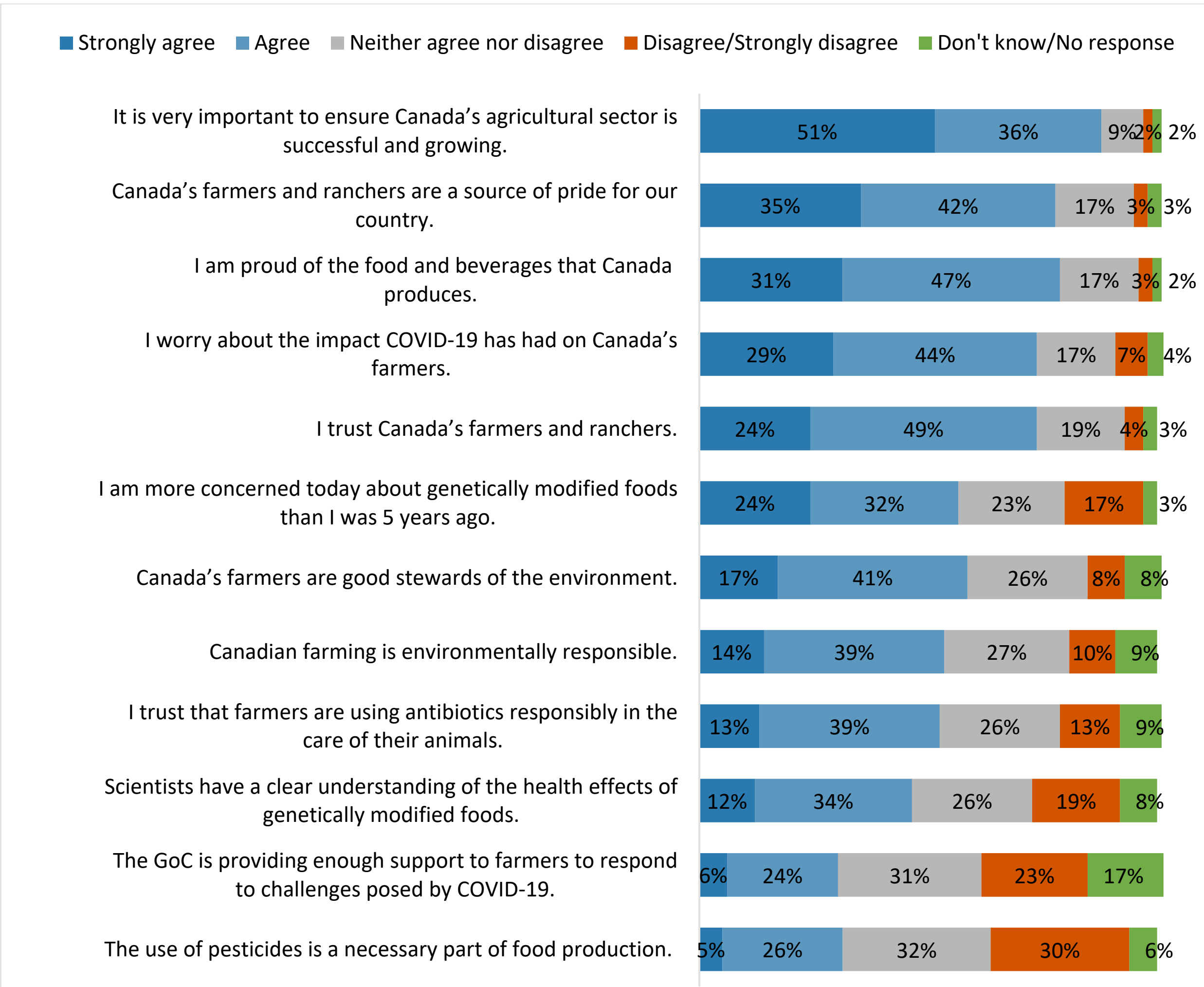

When provided with a list of attitudinal statements concerning the state of Canada's agriculture and food sector, as well as the impacts of COVID-19, most (63%) shoppers indicated they are concerned about the impact COVID-19 may have on Canadian farmers and less than a third (30%) are convinced the Government of Canada is doing enough to help Canadian farmers. There tends to be faith in farmers' judgement and responsible behaviour when it comes to the environment (54%) and antibiotics (52%). Nevertheless, shoppers do have concerns. Just over half (56%) are more concerned about GMO foods today than they have been in the past. However, about half (46%) feel that scientists have a clear understanding of the health effects of GMO foods – a proportion that far outstrips the proportion who hold the opposite view (19%). Opinion is divided over whether pesticides are necessary (31% agree and 30% disagree). Overall, the statement "It is very important to ensure Canada's agricultural sector is successful and growing" (87%) rendered the highest level of agreement.

Significant demographic differences among the attitudinal statements include:

- Shoppers aged 55+ are significantly more likely to agree with the majority of attitudinal statements, among the largest differences are "it is important to ensure Canada's agricultural sector is successful and growing" (94%), "I am proud of the food and beverages that Canada produces" (85%), and that "Canada's farmer/ranchers are a source of pride for our country" (84%).
- Younger shoppers aged 18-24 are significantly more likely to agree that "scientists have a clear understanding of the health effects of genetically modified foods" (59%).
- Quebec residents are significantly more likely those residing in other provinces to agree that "I am more concerned today about genetically modified foods than I was 5 years ago" (66%), and that "scientists have a clear understanding of the health effects of genetically modified foods" (53%).
- Shoppers living in Alberta are significantly more likely to agree "the use of pesticides is a necessary part of food production" (41%).

- Shoppers living in rural areas are significantly more likely than their counterparts to agree that "Canada's farmers are stewards of the environment" (65%), compared to those living in urban areas (56%).
- Grocery shoppers with post-graduate degrees are significantly more likely to agree "I feel the Government of Canada is providing enough support to farmers to respond to the challenges posed by COVID-19" (41%) compared to those who completed or partially completed high school (29%).

Exhibit B4: Q20 – To what extent do you agree or disagree with each of the following statements? Base = 2005




There is little concern over food availability being impacted by COVID-19, though 26% are at least moderately concerned about the availability of fresh produce. Slightly less are concerned about the availability of fresh meat (23%), food grown/produced in Canada (22%), and pantry staples (22%). Grocery shoppers are least concerned about the availability seafood (15%), packaged foods/beverages (13%), and alcoholic beverages (8%).

Half of shoppers (51%) are concerned about food affordability in Canada, and an equal portion are concerned about the level of food waste due to disruptions caused by COVID-19 (52%). Slightly fewer, though still roughly half of shoppers, are concerned about the use of hormones (48%), pesticides (47%), genetically modified foods (45%), and antibiotics (45%).

Responses across all demographics are fairly consistent in terms of food availability, with minimal significant differences. Worth noting, women were more concerned than men the availability about the availability of every food type except residents of Quebec and shoppers earning a household income of less than $40,000, and residents are significantly more concerned about the availability of all foods compared to those residing in other provinces.

Important demographic differences to note regarding food sector concerns include:

- Women are far more concerned about food availability than men, specifically the availability of produce (31% vs. 21%), fresh meat (26% vs. 20%), pantry staples (25% vs. 19%), and food grown/produced in Canada (26% vs. 18%).
- Further, women are significantly more likely than men to be concerned about the availability of all food and beverages due to COVID-19.
- Shoppers aged 55+ are significantly more likely to be concerned about the use of hormones (54%), pesticides (51%), GMO foods (51%), and antibiotics (50%). Those aged 24-35 are the most likely to be concerned about the impact of agriculture activities on the environment (46%). Finally, those aged 18-24 are the most likely to be concerned about the safety of food they have bought since the start of COVID-19 (35%).
- Residents of Quebec are significantly more worried about the availability of produce (36%), pantry staples (28%), Canadian grown/produced foods (28%), dairy products (24%), and seafood (22%) than those in other provinces.
- Ontario residents are significantly more likely to be concerned about the use of seasonal foreign workers in the agriculture and food sector (33%). Quebec residents are significantly more likely to be concerned about the use of hormones (56%), pesticides (59%), antibiotics (55%), GMOs (55%), the impact of agriculture activities on the environment (50%), and the safety of food bought since the start of COVID-19 (37%).
- Shoppers with household incomes of less than $40,000 are significantly more likely than those earning higher amounts to be concerned about the availability of Canadian food (28%), dairy products (25%), eggs (23%), seafood (20%), and packaged foods (19%).
- Further, shoppers earning household incomes of less than $40,000 are significantly more likely than those earning more to be concerned about the amount of food waste due to disruptions caused by COVID-19 (59%), and the use of pesticides (56%).
- Finally, shoppers not in the workforce are significantly more likely than their counterparts to be concerned about the use of antibiotics (50%), and GMO foods (51%).

Exhibit B5: Q21 – How concerned, if at all, would you say you are about the availability of any of the following foods or food products due to the new coronavirus or COVID-19 pandemic? Base = 2005

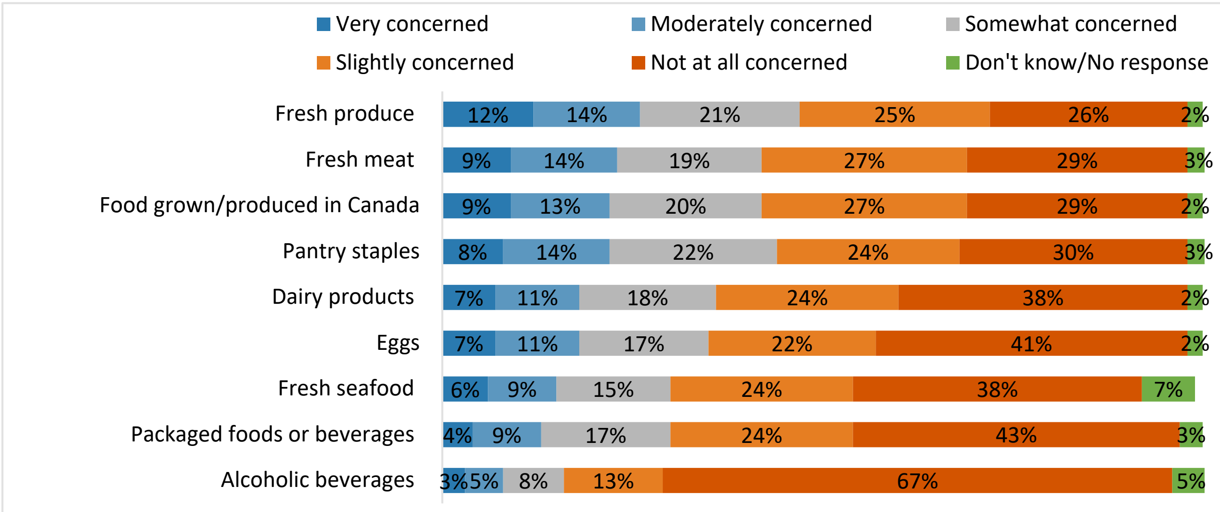
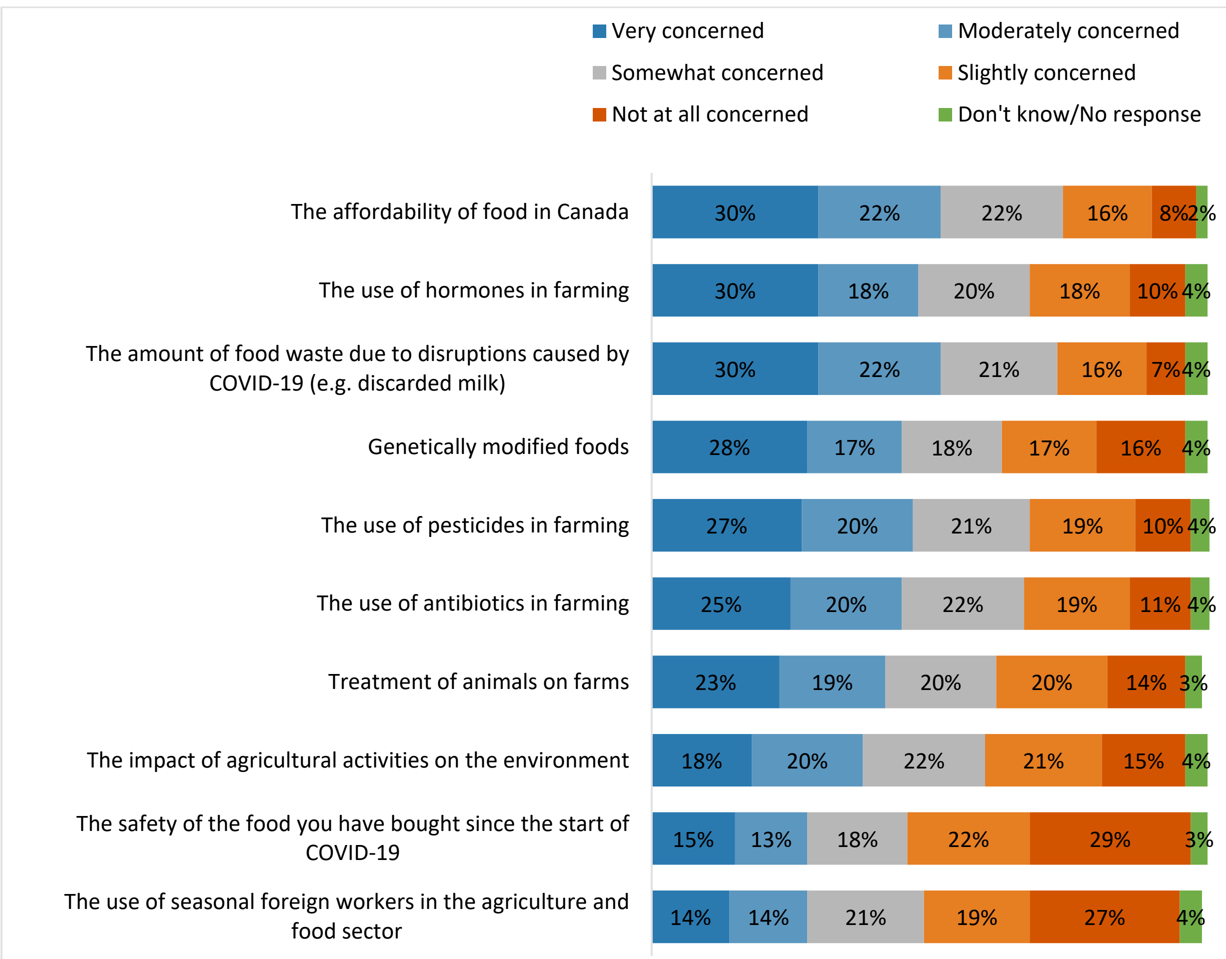



Exhibit B6: Q22 – How concerned, if at all, would you say you are about each of the following in Canada? Base = 2005

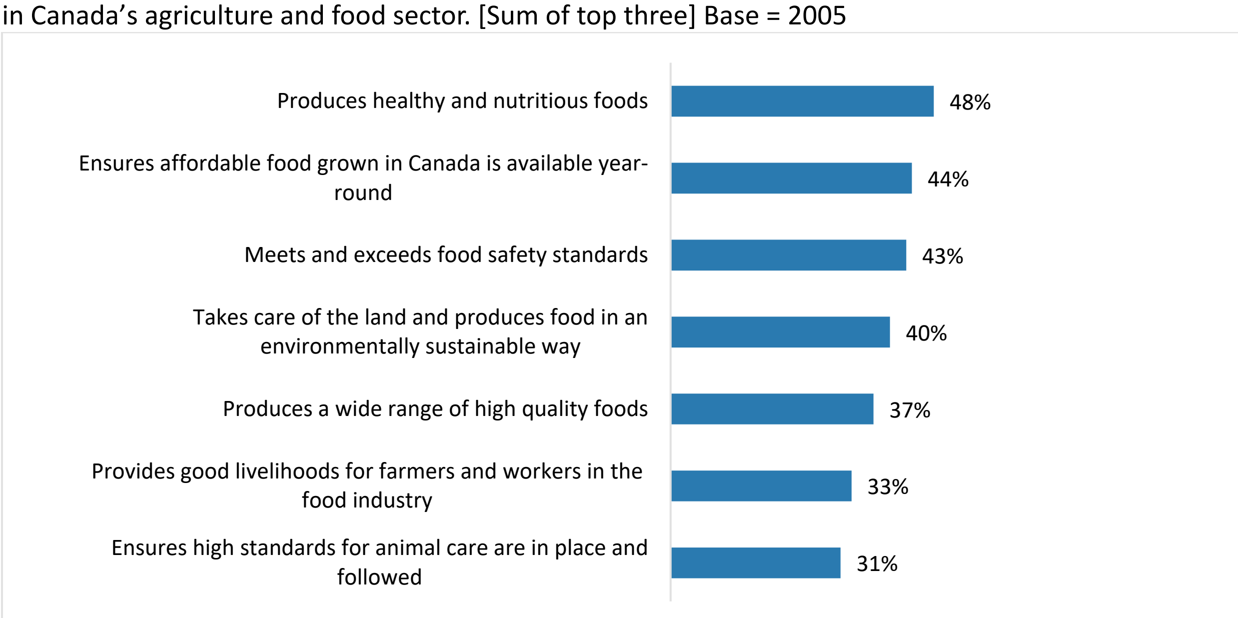


Shoppers were asked to rank a list of seven possible objectives in terms of the relative pride in Canada's agricultural sector each would instil. Roughly one in two shoppers would be most proud of Canada's agricultural sector producing healthy food and nutritious food (48%). Canada's ability to ensure affordable food grown year round (44%), and Canada's agriculture and food sector meeting and exceeding food safety standards (43%) are also great sources of pride. Whereas, providing good livelihoods for farmers and workers in the food industry (33%), and ensuring high standards for animal care are in place and followed (31%) are significantly less of a priority for shoppers.

Key demographic differences include:

- Men are significantly more likely than women to select "produces a wide range of high-quality foods among the top three" (41% vs. 32%).
- Manitoba/Saskatchewan residents and Quebec residents are significantly more likely than other to be proud of Canada's agriculture and food sector taking care of the land and producing food in an environmentally sustainable way (47% and 46% respectively).
- Indigenous shoppers are significantly more likely to select "produces healthy and nutritious foods" in their top three (62%).
- Members of the lesbian, gay, bisexual, transgender, queer (or sometimes questioning), two-spirited (LGBTQ2) community are significantly more likely than others to opt for "takes care of the land and produces food in an environmentally sustainable way" (50%).
- Shoppers with post-graduate degrees are significantly more likely to feel that a wide range of high-quality food being produced are a source of pride (43%).

Exhibit B7: Q23 – Please rank the statements below based on what would make you have the most pride in Canada's agriculture and food sector. [Sum of top three] Base = 2005

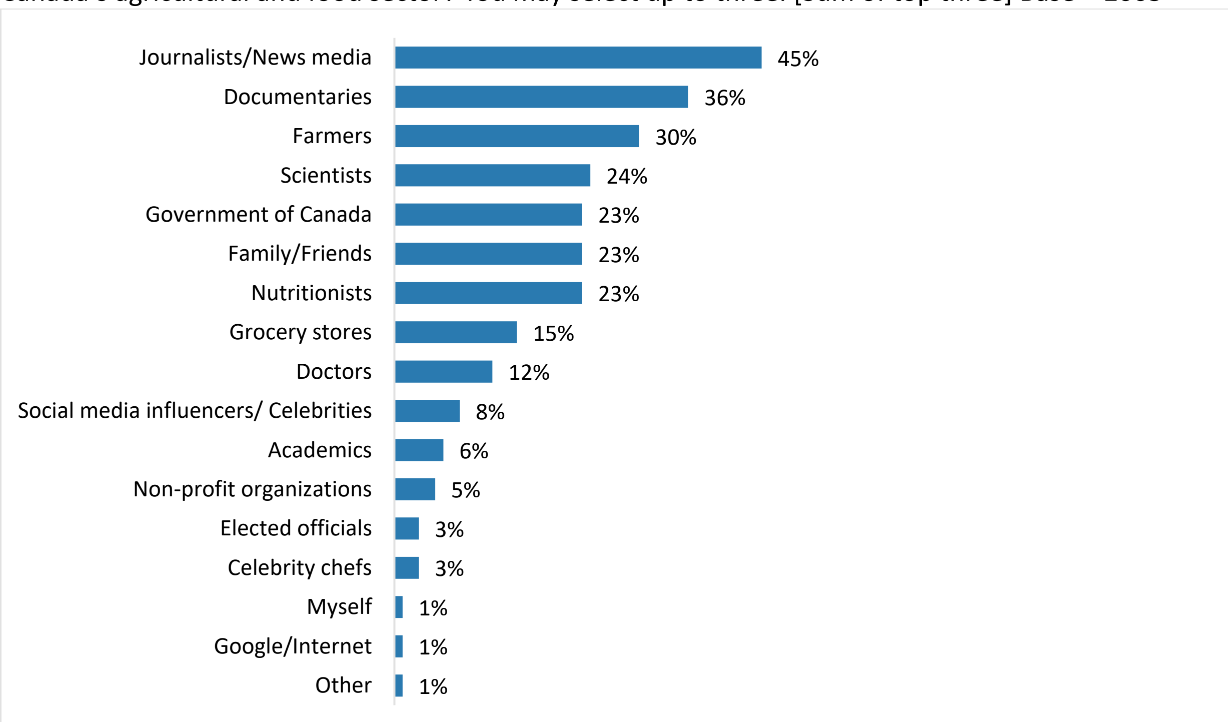



The most common sources for information on food and agriculture are journalists (45%) and documentaries (36%). Farmers (30%) and scientists (24%) also top the chart as sources, followed by the Government of Canada, family/friends, and nutritionists all tied at 23%. Meanwhile, elected officials (3%) celebrity chefs (3%), oneself (1%) and Google (1%) are among the least common sources for information about Canada's agriculture and food sector.

Notable significant differences include:

- Women are significantly more likely than men to trust nutritionists (26% vs. 20%), while men are more trusting of grocery stores (18% vs. 13%) than women.
- Shoppers aged 55+ are significantly more likely than their younger cohorts to trust documentaries (40%), and nutritionists (29%). Whereas, younger shoppers are significantly more likely to trust family and friends (33%) and doctors (20%)
- Quebec residents are most likely to trust documentaries (56%), the Government of Canada (29%), and celebrity chefs (6%) than those living in other provinces. Alberta residents are most likely to trust grocery stores (23%), and Manitoba/Saskatchewan residents are the most likely to trust family/friends (34%)
- Those living in rural areas are the most likely to trust farmers (45%) compared to those living in suburban (28%) or urban (27%) areas.
- Shoppers earning a household income of over $100,000 are significantly more likely than their counterparts to trust academics (9%).

Exhibit B8: Q24 – Which of the following sources do you use the most to gather information about Canada's agricultural and food sector? You may select up to three. [Sum of top three] Base = 2005



## Section C: Canadian Food

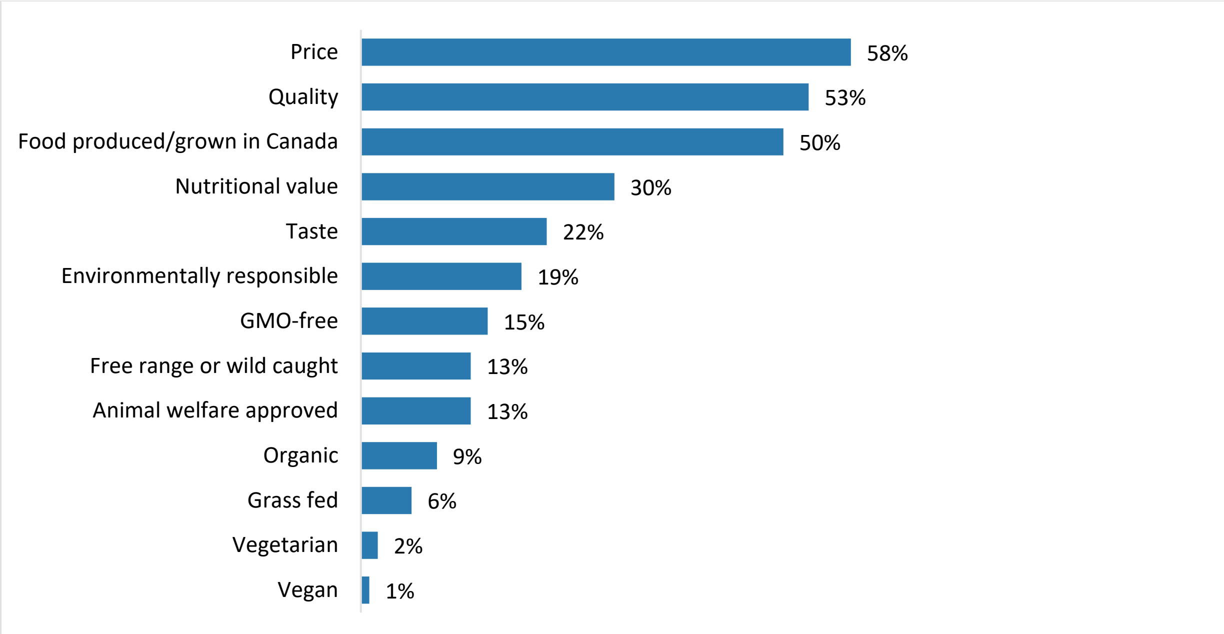
Throughout this section of the report shoppers are asked about their shopping preferences, deciding factors, impressions and desirability of Canadian grown and produced foods, as well as how they determine whether something is Canadian made.

When shopping for food, Canadians most often identify price (58%), quality (53%), and food produced/grown in Canada (50%) as factors that matter when shopping. Factors such as grass fed (6%), vegetarian (2%), and vegan (1%), are the least likely to be among the three most important considerations.

Important demographic differences to note include:

- Women are significantly more likely than men to rank food produced in Canada (53% and 46% respectively) and nutritional value (33% and 26% respectively) as factors that matter when shopping, while men are more likely to select taste (26% and 19% respectively) and grass fed (8% and 5% respectively).
- Older shoppers age 55+ are significantly more likely to select quality (59%) and food grown in Canada (64%) than their younger cohorts. Whereas those aged 18-24 are significantly more likely to select environmentally responsible (27%) and those 25-34 are most likely to select animal welfare approved (20%).
- Quebec residents are significantly more likely to select foods produced/grown in Canada (59%), and animal welfare approved (18%).
- Shoppers living in rural areas are significantly more likely than those living in urban areas to prioritize food grown/produced in Canada (59% vs. 46%).
- Those with household incomes of over $100,000 are significantly more likely than those under $40,000 to prioritize quality (57% and 46% respectively).
- Shoppers without children are more likely to select price (60%), quality (56%), and food produced/grown in Canada (55%), while parents are more likely to select GMO-free foods (19%), free range (17%), or grass fed (10%).

Exhibit C1: Q25 – Which of the following matter most to you when shopping for food? You may select up to three. [Sum of top three] Base = 2005




Shoppers have very high impressions of the quality of the food and beverages produced in Canada. A third of shoppers deem the quality of food produced/grown in Canada as excellent, and another 50% say the quality is good. Two-thirds of shoppers agree there are food items they buy that Canada produces better (67%), and an equal portion agree there are enough Canadian beverages available for purchase (66%). Most (64%) agree Canadian grown/produced foods are better than imported foods, and one in two (59%) agree that since COVID-19 they have bought Canadian food and beverages more often. Though a fifth (20%) would not be willing to pay more for foods/beverages grown/produced in Canada. Further, 58% agree that some food or beverages they buy do not have Canadian options.

Significant demographic differences include:

- Men are significantly more likely than women to agree that there are enough Canadian beverages available for purchase (70% vs. 62%). Women are significantly more likely to agree that Canadian grown foods are better for the environment than imported foods (66% and 60%), and that they have bought more Canadian foods and beverages since COVID-19 (53% vs. 45%).
- Shoppers aged 55+ are significantly more likely to feel that the quality of food produced and grown in Canada is excellent/good (90%) compared to those aged 35-54 (83%), 25-34 (72%), and 18-24 (75%).
- Older shoppers aged 55+ are significantly more likely to agree with all attitudinal statements other than there being enough Canadian foods and beverages available, and not having a Canadian option available.
- Quebec residents are significantly more likely to feel that the quality of food produced in Canada is excellent/good (88%).
- Ontario residents are significantly more likely than others to agree that Canadian foods are affordable to buy (55%). Quebec residents are more likely to agree that Canadian foods are better for the environment (71%), and since the pandemic they have purchased more Canadians foods (62%).

- Grocery shoppers earning a household income of more than $100,000 are significantly more likely to agree that some food and beverage items they purchase do not have Canadian-made options available (67%).

Exhibit C2: Q26 – Generally speaking, what is your impression of the quality of the food and beverages produced/grown in Canada? Base = 2005

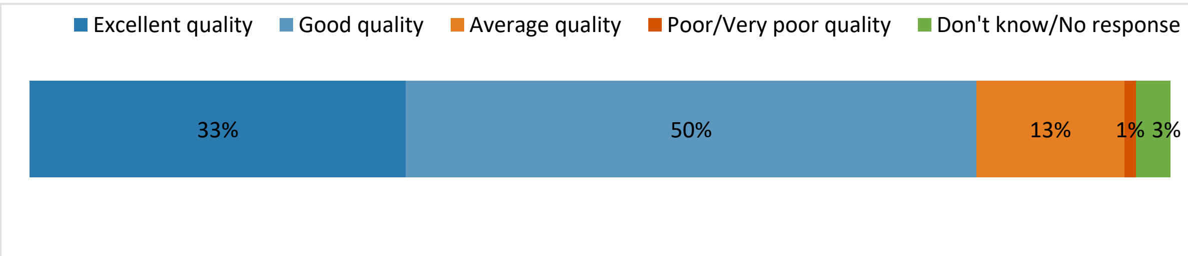
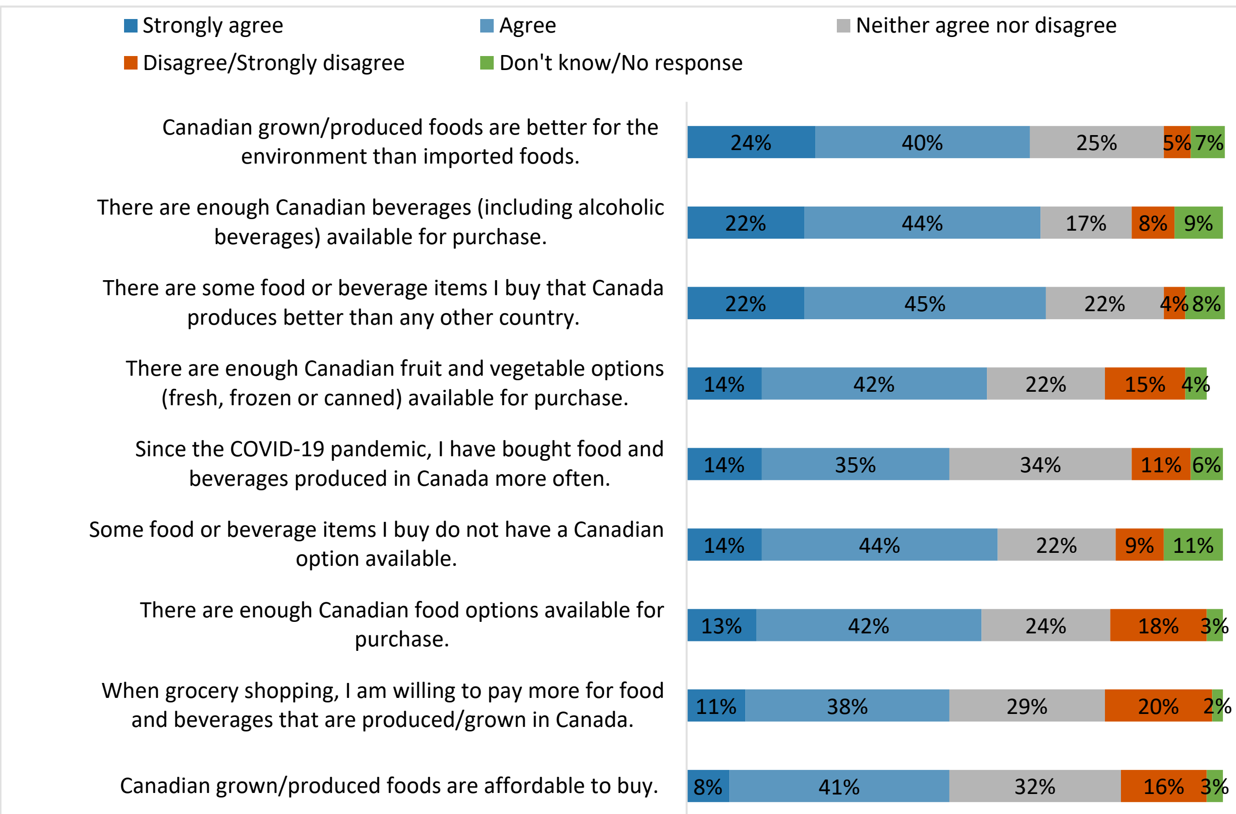



Exhibit C3: Q27 – To what extent do you agree or disagree with each of the following statements? Base = 2005




Half (52%) of shoppers often or always look for food or beverages produced in Canada and virtually all (99%) look for Canadian items at some time. When they do, the majority (61%) find it easy to identify whether a food or beverage has been produced or grown in Canada. When identifying country of origin, alcoholic beverages are deemed the easiest to determine Canadian products, while fresh seafood the most difficult.

Significant demographic differences to note include:

- Men are significantly more likely than women to feel it is easy to determine whether or not a food/beverage has been produced in Canada (63% vs. 58% respectively).
- Men are also significantly more likely than women to find it easy to identify if alcoholic beverages (75% vs. 67%) or seafood (44% vs. 39%) are Canadian.
- Older shoppers aged 55+ are more than twice as likely as those aged 18-24 to often or always look for foods or beverages produced in Canada (66% compared to 28%).
- Quebec residents (65%) are the most likely to look for foods or beverages produced/grown in Canada, followed by Atlantic Canadian residents (50%) and Ontario residents (49%).
- Those living in Atlantic Canada are significantly more likely to find it easy to determine if fresh seafood is Canadian (53%), while those living in B.C. are more likely to find it easy to determine if meat products are Canadian (66%). Lastly, Ontario and Quebec residents (67% and 68% respectively) are the most likely to find that it is easy to determine if fresh produce is Canadian.
- Shoppers living in rural areas are significantly more likely to look for foods or beverages produced in Canada compared to those living in urban areas (57% vs. 49%).
- Further, parents are significantly less likely to look for Canadian foods/beverages compared to those without children (42% vs. 56%). However, they are more likely to find it easy to determine whether or not a food is Canadian (67% vs. 56%).
- Parents are also more likely to find it easy to determine if fresh meat (64%) or fresh seafood (46%) are Canadian compared to those who do not have children (58% and 40% respectively).
- Those who are unemployed (62%), or self-employed (61%) are the most likely to look for foods or beverages produced in Canada.
- Indigenous shoppers are significantly more likely to feel it is easy to determine whether or not a food has been produced/grown in Canada (76%).

Exhibit C5: Q28 – How often do you look for food or beverages (including alcoholic beverages) produced/grown in Canada? Base = 2005

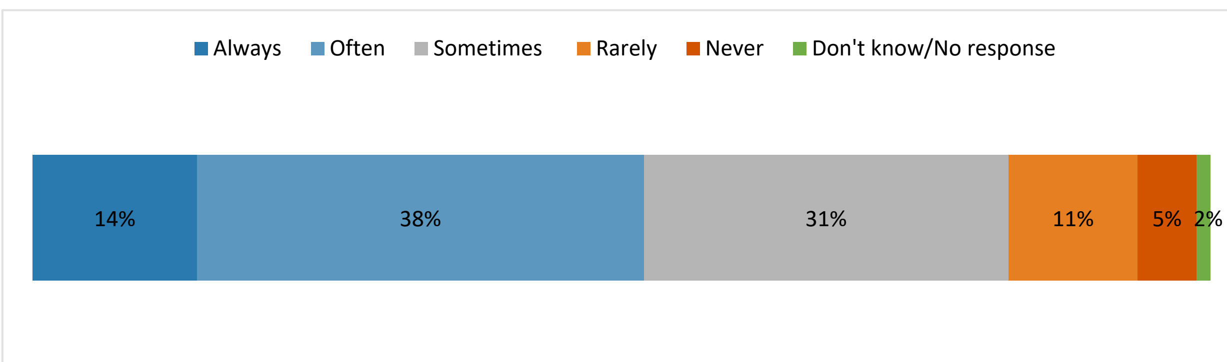


Exhibit C5: Q29 – [IF LOOK FOR CANADIAN FOOD >NEVER] When you are shopping for food and beverages (including alcoholic beverages) produced/grown in Canada, how easy or difficult do you feel it is to determine whether or not an item is Canadian? Base = 1911

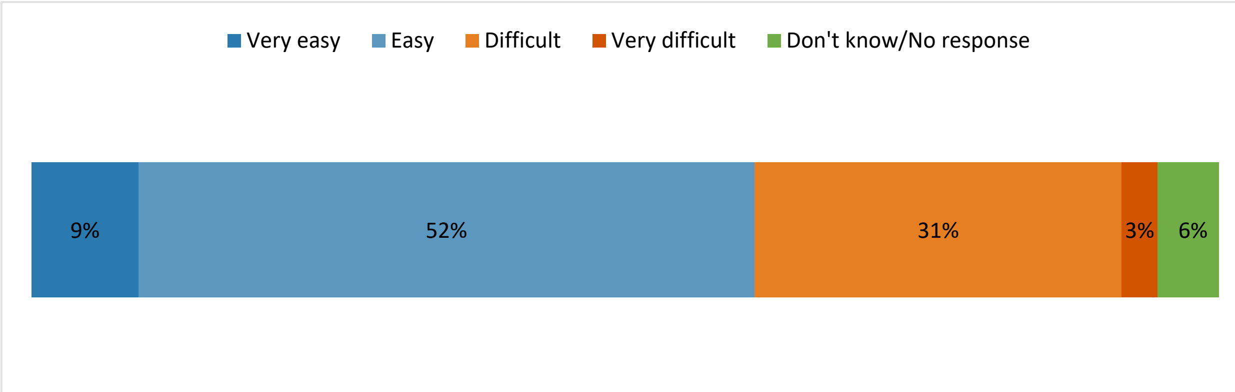



Exhibit C6: Q30 – And when you are shopping for each of the following specific types of food and beverages, how easy do you feel it is to determine whether each of the following foods are Canadian or from another country? Base = 2005


Most shoppers use the labels (87%) or signs (46%) to identify country of origin, while nearly one in ten shoppers consult a vendor, restaurant, or product website (8%). Over half of shoppers always or often look specifically for meat (58%) and produce (62%) grown in Canada, two in five always or often look for Canadian seafood (41%) or Canadian packaged foods (40%), and just over a third always or often look for Canadian alcoholic beverages (37%).

Important demographic differences to note:

- Women (21%) are significantly more likely to buy directly from local farmers and growers compared to men (14%).
- Women are also significantly more likely to purchase Canadian produce (66%), while men are more likely to purchase Canadian alcoholic beverages (40%).
- Older shoppers aged 55+ are more likely to shop for all categories of Canadian foods compared to shoppers aged 18-24, 25-34, and 35-54.
- Residents of Quebec are most likely to read signage or displays, whereas shoppers living in Alberta are most likely to read labels (92%).

- Shoppers living in Quebec (75%) were significantly more likely to look for Canadian produce, meat (65%) or seafood (49%).
- Grocery shoppers living in rural areas are significantly more likely than their counterparts to buy directly from local farmers (25%), while those living in urban areas are significantly more likely to consult a vendor or website (11%).
- Those living in rural communities were also more likely to look for Canadian produce (70%), meat (71%), seafood (49%), or packaged food (47%).
- Indigenous shoppers are significantly more likely to talk to a vendor (25%), compared to the general population (13%). Indigenous shoppers are also more likely to shop for Canadian seafood (54%).

Exhibit C7: Q31 – When you are trying to determine whether or not a food or beverage is from Canada, how do you identify the country of origin? [SELECT ALL THAT APPLY] Base = 2005

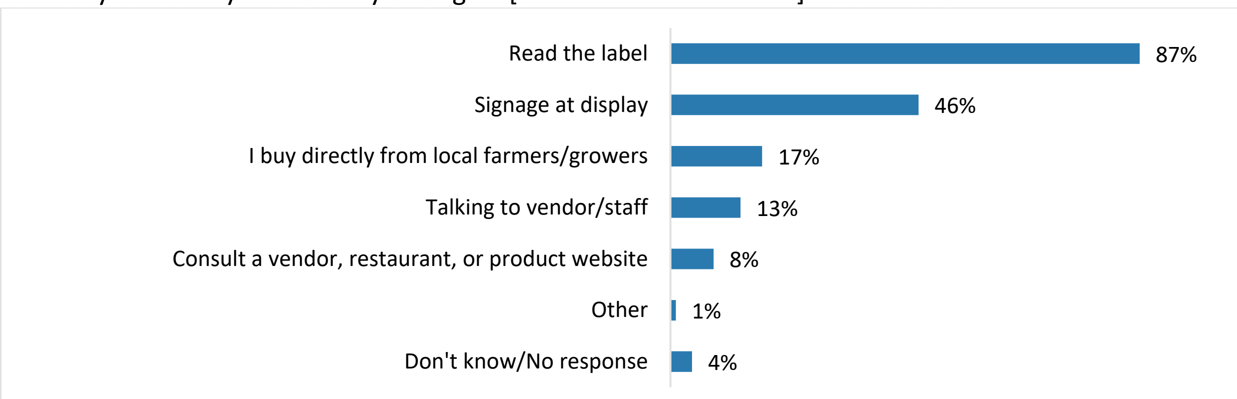
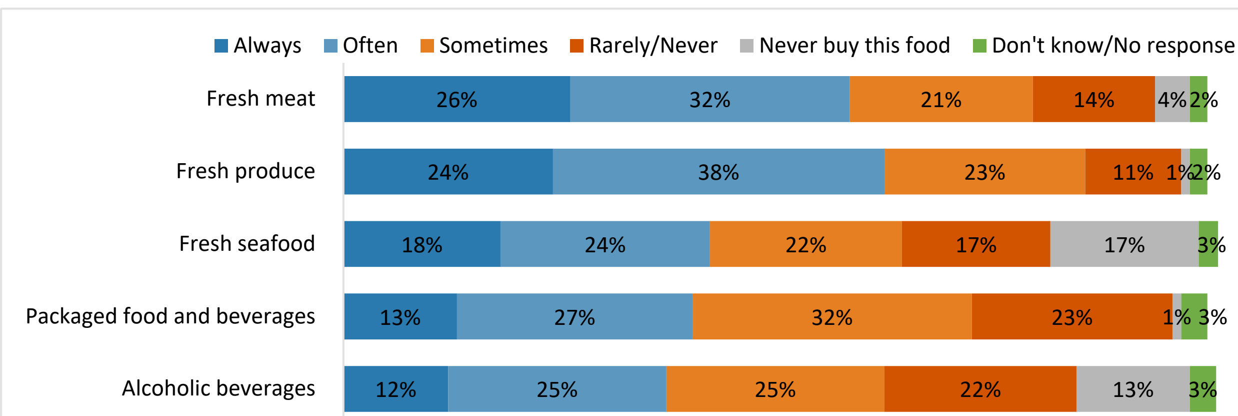



Exhibit C8: Q32 – When purchasing the following foods or beverages, how often do you look specifically for an option that is produced/grown in Canada? Base = 2005



## Section D: Food Policy

This section addresses expiry dates, food waste in Canada, and concern, causes and solutions to household food waste.

The majority of shoppers (61%) think "best before date" and "expiration date" mean different things, while roughly a third (36%) feel they mean the same thing. In an effort to reduce the amount of food wasted in Canada, over half (60%) of shoppers would place a lot of the responsibility on grocery stores, and restaurants (57%). Slightly less feel a lot of the responsibility should be given to the Government of Canada (41%) or farmers (28%).

With regards to household food waste, two-thirds (64%) of shoppers feel reducing food waste is very important, another 28% feel it is important. Food going bad (58%) is most often seen as the main reason for food waste in shoppers' households. Tied at the second most common reasons for food waste are expiry dates and too much food being prepared (36%). The most prevalent solution to household food waste was identified as only buying what you need (62%), followed by meal planning (49%).

Important significant differences in terms of food waste include:

- Women are significantly more likely than men to feel it is important to reduce the amount of food waste in their household (94% vs. 89%).
- Men are significantly less likely to have tried meal planning (47%) or creating food and freezer inventory (25%) in an effort to reduce household food waste compared to women (51% and 29% respectively).
- Younger shoppers 18-24 (41%), and 25-34 (41%) are significantly more likely to feel that 'best before date' and 'expiry date' mean the same thing. Older shoppers aged 35-54 (61%) and 55+ (64%) are significantly more likely to feel they mean different things.
- Older shoppers 55+ are most likely to attribute a lot of the responsibility on grocery stores (94%), whereas younger shoppers 18-24 (83%), and 25-34 (86%) are most likely to attribute a lot of the responsibility to the Government of Canada.
- Grocery shoppers aged 55+ are significantly more likely to have tried buying only what they need (66%) and creating a fridge/freezer inventory (30%). Grocery shoppers 25-34 are the most likely to have tried meal planning (57%), and those aged 18-24 are the most likely to have tried paying closer attention to dates (45%) and buying more packaged foods (19%).
- Quebec residents (57%) are significantly more likely than those living in other provinces (all under 32%) to feel that 'expiry date' and 'best before date' mean the same thing.
- Shoppers living in Atlantic Canada are significantly more likely to feel that farmers should bear a lot of responsibility in reducing the amount of food wasted in Canada, compared to those living in Manitoba/Saskatchewan (78% and 58% respectively).
- Quebec residents are the most likely to have tried meal planning as a means of reducing the food wasted in their household compared to all other provinces (59% vs. 40%-48% in other provinces).
- Shoppers living in rural areas are significantly more likely to feel that 'expiry date' and 'best before date' mean the same thing (38%), while those living in urban areas are significantly more likely to feel they mean different things (65%).
- Those living in urban areas are also significantly more likely than those living in rural areas to have begun buying more packaged foods in an effort to reduce household food waste (13% vs. 8% respectively).
- Members of the LGBTQ2 community almost unanimously agree that a lot of the responsibility should be placed on restaurants to reduce the amount of food wasted in Canada (96% compared to 89% of the total sample).

- Indigenous shoppers are roughly twice as likely to attribute household food waste to preparing too much compared to the total sample (67% and 36% respectively).
- Grocery shoppers holding post-graduate degrees are significantly more likely than those who have completed or partially completed high school to believe that 'expiry date' and 'best before date' mean different things (72% vs. 60%).

Exhibit D1: Q33 – Do the terms "best before date" and "expiration date" mean the same thing or different things to you? Base = 2005

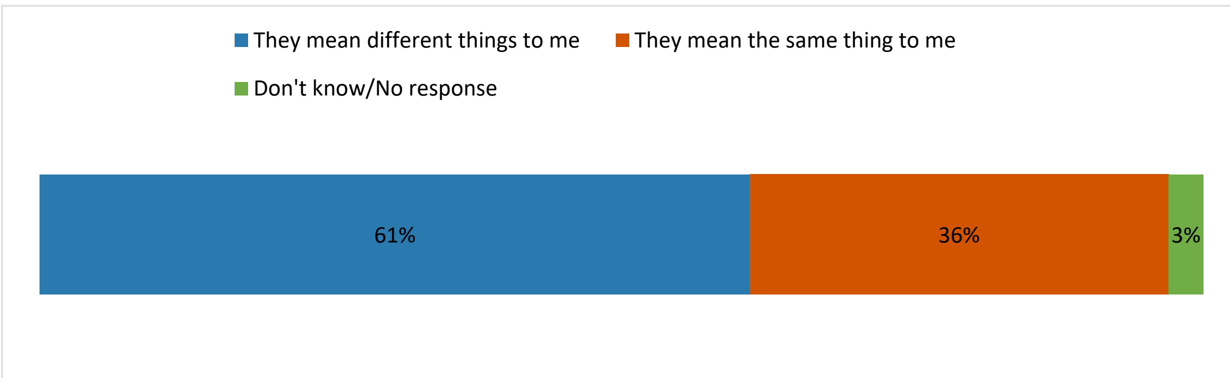



Exhibit D2: Q34 – If an effort were made to reduce the amount of food wasted in Canada, how much responsibility would you assign to each of the following? Base = 2005

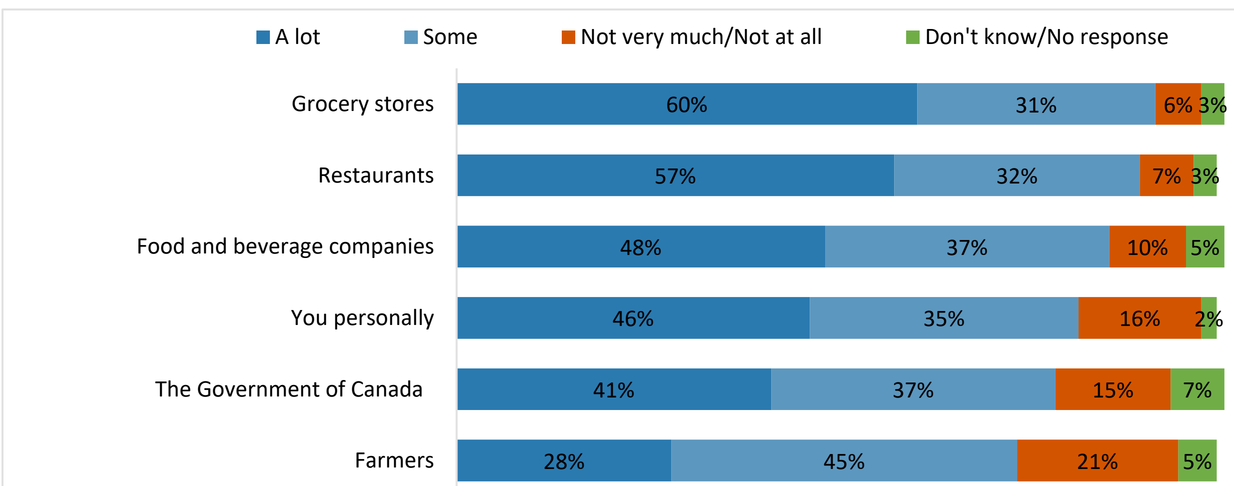


Exhibit D3: Q35 – How important do you feel it is to reduce the amount of food that is wasted in your household? Base = 2005

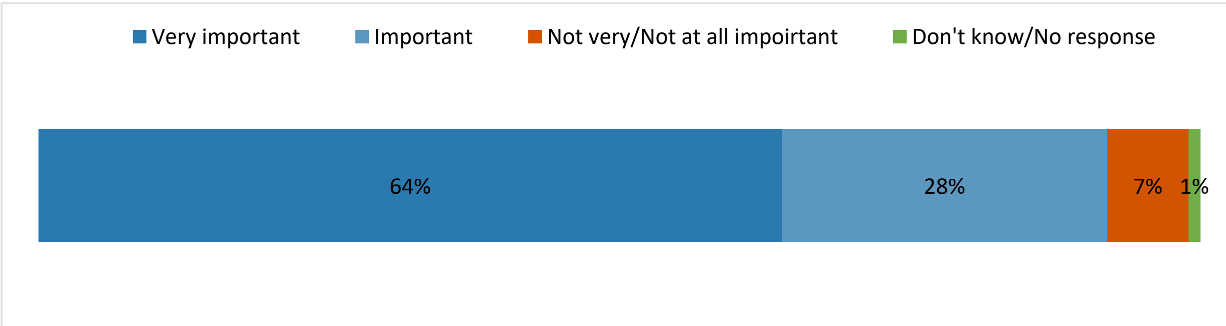



Exhibit D4: Q36 – What are the main causes of food waste in your household? Base = 2005

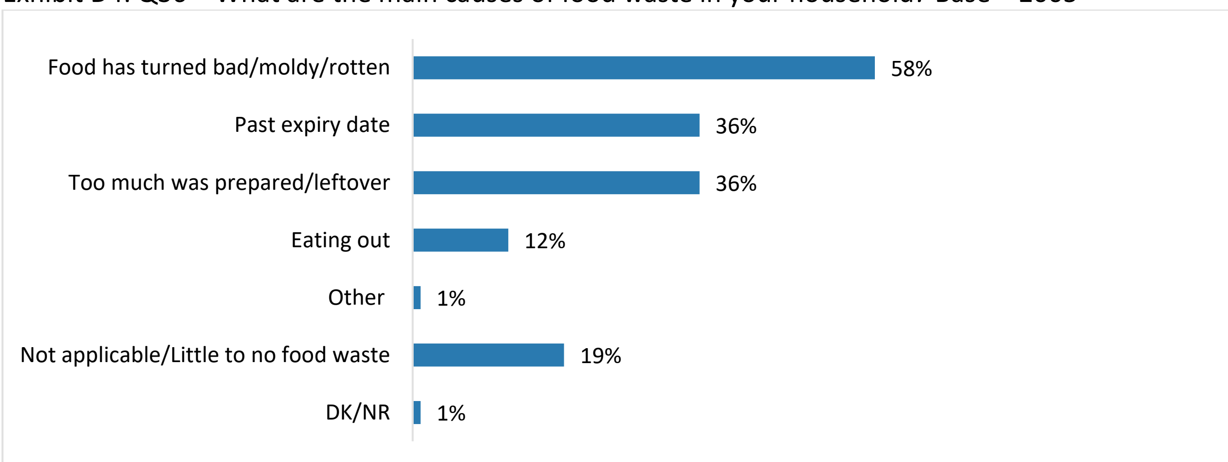
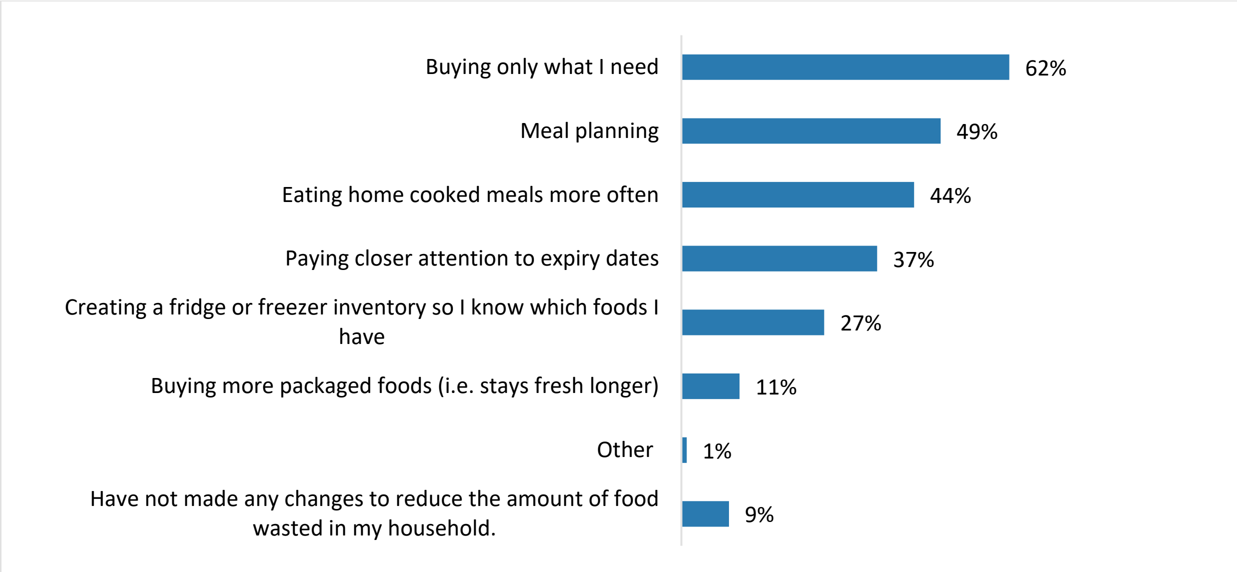


Exhibit D5: Q37 – What, if any, changes have you made in order to help reduce the amount of food waste in your household? Base = 2005



# Conclusions

With the COVID-19 pandemic, Canadians are facing what is for the vast majority, the most intense societal crisis of their lifetime and it has impacted their behaviours in significant ways. Specifically, with regards to food, while there has been no apparent impact on the grocery shopping roles people are playing within their household, many are reporting significant change in food purchasing behaviours.

Most notably, shopping sources such as specialty stores and farmers' markets are being relied upon less, while online options for ordering groceries or meals have become regular channels for many. As pandemic restrictions ease, many expect a return to previous habits with regards to farmers' markets and grocery stores. However, the survey results suggest that the online channels have not only attracted an expanded number of customers, they appear to have forged relationships that are expected to last beyond the duration of the pandemic.

When it comes to Canadian food, shoppers feel somewhat knowledgeable about the country's agriculture and food sector and hold favourable impressions of it. Indeed, there is broad consensus around the importance of, the pride taken in, and trust placed in food produced in Canada. Shoppers in Canada use price as a factor influencing purchase more often than any other factor – quality and food produced/grown in Canada were not far behind. They appreciate the high quality of food and beverages produced in Canada and tend to feel these domestic options are better than imported foods. Grocery shoppers not only describe habits around seeking out country of origin information when shopping, the majority also feel they find that information rather easily, at least for many products. With some items such as seafood, shoppers feel the information is not always easy to find.

Perhaps relatedly, views of food producers in Canada are far more positive than negative and there is some degree of faith in farmers' judgement when it comes to protecting the environment or use of antibiotics. At the same time, shoppers are concerned for the impact COVID-19 may be having on Canadian farmers and many lack confidence the Government of Canada is doing enough to support farmers during the pandemic.

The concern for well-being of Canadian food producers has not, however, translated into particularly broad concern for the availability of food during the pandemic. Canadians are more likely to be concerned about the affordability of food and the waste of food, than its availability.

# Appendix A: Quantitative Methodology Report

## Survey Methodology

Earnscliffe Strategy Group's overall approach for this research was to conduct an online survey of 2,005 Canadians aged 18 and older who are at least somewhat responsible for household grocery shopping using an online panel sample. A detailed discussion of the approach used to complete this research is presented below.

## Questionnaire Design

The questionnaire for this research was designed by Earnscliffe, in collaboration with Agriculture and Agri-Food Canada, and provided for fielding to Leger. The survey was offered to shoppers in both English and French and completed based on their language preference. Grocery shoppers could not skip any of the questions as all questions required a response before continuing to the next question.

## Sample Design, Selection and Weighting

The sampling plan for the research was designed by Earnscliffe in collaboration with Agriculture and Agri-Food Canada. The quantitative phase involved an online survey of 2,005 Canadians aged 18 and older. Further, shoppers had to be have primary or shared grocery shopping responsibilities for their households. The online survey was conducted using our data collection partner, Leger's, proprietary online panel. Quotas were set for gender, age and region. Further, the final data were weighted to replicate actual distribution of population aged 18 and older by region, age and gender according to the most recent Census (2016) data.

## Data Collection

The online survey was conducted from July 28, 2020 to August 3, 2020 in English and in French. The survey was undertaken by Leger using their proprietary online panel.

## Reporting

Due to rounding, results may not always add to 100%.

## Quality Controls

Leger's panel is actively monitored for quality through a number of approaches (digital fingerprinting, in-survey quality measures, incentive redemption requirements, etc.) to ensure that responses are only collected from legitimate Canadian panel members. The survey link is reviewed multiple times before a comprehensive soft launch is conducted in both languages. The soft launch data is thoroughly reviewed, and any changes are made before another test of the links and full-launch of the survey.

## Results

### *Final Dispositions*

A total of 4,817 individuals entered the online survey, of which 2,051 qualified as eligible and completed the survey. The response rate for this survey was 23%.

| Survey Status | Number |
|---|---|
| Completed | 2005 |
| Not Qualified/Screen out | 84 |
| Over quota | 149 |
| Suspend/Drop-off | 137 |
| Total | 4817 |

| Unresolved (U) Cases | Number |
|---|---|
| Email invitation bounce-backs | 18 |
| Email invitations unanswered | 2439 |
| Total | 2457 |
| In-scope - Non-responding (IS) Cases | Number |
| Non-response from eligible respondents | 2439 |
| Respondent refusals | 71 |
| Language problem | 0 |
| Selected respondent not available | 2439 |
| Qualified respondent break-off | 0 |
| Total | 4949 |
| In-scope - Responding (R) Cases | Number |
| Completed surveys disqualified – quota filled | 149 |
| Completed surveys disqualified – other reasons | 84 |
| Completed surveys | 2005 |
| Total | 2238 |
| Response Rate = R/(U+IS+R) | 23% |

### *Non-response*

Shoppers for the online survey were selected from among those who have volunteered to participate in online surveys by joining an online opt-in panel. The notion of non-response is more complex than for random probability studies that begin with a sample universe that can, at least theoretically, include the entire population being studied. In such cases, non-response can occur at a number of points before being invited to participate in this particular survey, let alone in deciding to answer any particular question within the survey.

That being said, in order to provide some indication of whether the final sample is unduly influenced by a detectable non-response bias, the tables below compare the unweighted and weighted distributions of each sample's demographic characteristics.

The final data were weighted to replicate actual distribution of population aged 18 and older by region, age and gender according to the most recent Census (2016) data available.

### *Total Sample Profile: Unweighted Versus Weighted Distributions*

| Region | Unweighted Sample (n) | Weighted Sample (n) |
|---|---|---|
| Atlantic | 126 | 136 |
| Quebec | 471 | 468 |
| Ontario | 779 | 771 |
| Manitoba/Saskatchewan | 124 | 128 |

| | | |
|---|---|---|
| Alberta | 226 | 228 |
| British Columbia | 279 | 274 |
| Territories | 0 | 0 |
| Total | 2005 | 2005 |

| Age | Unweighted Sample (n) | Weighted Sample (n) |
|---|---|---|
| 18-24 | 218 | 211 |
| 25-34 | 339 | 327 |
| 35-54 | 671 | 689 |
| 55+ | 777 | 778 |
| Total | 2005 | 2005 |

| Gender | Unweighted Sample (n) | Weighted Sample (n) |
|---|---|---|
| Male | 971 | 971 |
| Female | 1034 | 1034 |
| Gender diverse | 0 | 0 |
| Total | 2005 | 2005 |

| Household Income (18 and older) | Unweighted Sample (n) | Weighted Sample (n) |
|---|---|---|
| Under $40,000 | 375 | 373 |
| $40,000 to just under $60,000 | 312 | 312 |
| $60,000 to just under $80,000 | 266 | 263 |
| $80,000 to just under $100,000 | 263 | 267 |
| $100,000 and above | 543 | 544 |
| No response | 246 | 246 |
| Total | 2005 | 2005 |

| Employment (18 and older) | Unweighted Sample (n) | Weighted Sample (n) |
|---|---|---|
| Working full-time | 875 | 877 |
| Working part-time | 157 | 155 |
| Self employed | 112 | 112 |
| Student | 115 | 111 |
| Not in the workforce/Unemployed/Looking for work/Retired | 703 | 705 |
| No response | 43 | 45 |
| Total | 2005 | 2005 |

### *Margin of Error*

Shoppers for the online survey were selected from among those who have volunteered to participate/registered to participate in online surveys. Because the sample is based on those who initially self-selected for participation in the panel, no estimates of sampling error can be calculated. The results of such surveys cannot be described as statistically projectable to the target population. The treatment here of the non-probability sample is aligned with the Standards for the Conduct of Government of Canada Public Opinion Research for online surveys.

### *Survey Duration*

The online survey took an average of 15 minutes to complete.

# Appendix B: Questionnaire

## Email Invitation

La version française suit

Welcome and thank you for your interest in this study. Earnscliffe Strategy Group, in collaboration with Leger Marketing, has been hired to administer an online survey on behalf of the Government of Canada. The purpose of the study is to explore Canadians' opinions related to Canadian food and agriculture.

This online survey will take about 18 minutes to complete. Your participation in the study is voluntary and completely confidential. All your answers will remain anonymous and will be combined with responses from all other respondents. As a token of our appreciation for your participation, you will receive [insert reward].

If you have any questions about the survey or if you encounter any difficulties, please email [insert email contact].

To begin, click on the link below.

[URL]

## Landing Page

Welcome and thank you for your interest in this study. Earnscliffe Strategy Group, in collaboration with Leger, has been hired to administer an online survey on behalf of the Government of Canada. The purpose of the study is to explore Canadians' opinions related to Canadian food and agriculture.

Your responses to this survey will be kept entirely confidential and any information you provide will be administered in accordance with the Privacy Act and other applicable privacy laws. Do you wish to continue?

Yes
No [terminate]

## Screening

1. Please indicate your gender.

| | |
|---|---|
| Male | 1 |
| Female | 2 |
| Gender diverse | 3 |

2. Please indicate your age in years: _____ [if under 18 years, thank & terminate]

3. Which of the following provinces or territories do you live in?

| | |
|---|---|
| Newfoundland and Labrador | 1 |
| Nova Scotia | 2 |
| Prince Edward Island | 3 |
| New Brunswick | 4 |
| Quebec | 5 |
| Ontario | 6 |
| Manitoba | 7 |
| Saskatchewan | 8 |
| Alberta | 9 |
| British Columbia | 10 |
| Yukon | 11 |
| Nunavut | 12 |
| Northwest Territories | 13 |
| Prefer not to say [thank & terminate] | 99 |
| Do not currently live in Canada [thank & terminate] | |

## Consumer/Shopping Habits

4. How much of your household’s grocery shopping do you do?

| | |
|---|---|
| None [thank & terminate] | 0 |
| Less than half of it | 1 |
| About half of it | 2 |
| Almost all of it | 3 |
| All of it | 4 |
| Don’t know/Prefer not to answer [thank & terminate] | 99 |

5. For some people, grocery shopping frequency or habits have changed since the COVID-19 pandemic. Before COVID-19, how much of your household’s grocery shopping would you typically do?

| | |
|---|---|
| None | 0 |
| Less than half of it | 1 |
| About half of it | 2 |
| Almost all of it | 3 |
| All of it | 4 |

| | |
|---|---|
| Don’t know/Prefer not to answer [thank & terminate] | 99 |

6. When was the last time you went shopping for groceries?

| | |
|---|---|
| Today | 1 |
| A few days ago | 2 |
| About a week ago | 3 |
| A few weeks ago | 4 |
| About a month ago | 5 |
| It's been over a month | 6 |
| Don’t know/Prefer not to answer | 99 |

7. When grocery shopping in-store during the COVID-19 pandemic, have you done any of the following? Please select all that apply. [select all that apply]

| | |
|---|---|
| Wore a non-medical/cloth mask | 1 |
| Used extra hand sanitizer | 2 |
| Wiped down groceries with disinfectant | 3 |
| Brought your own bags | 4 |
| Bought groceries for someone not living in your household | 5 |
| None of the above [exclusive] | 6 |
| Don’t know/Prefer not to answer | 99 |

8. The last time you went shopping for groceries, how easy or difficult was it to find each of the following items? [randomize]

a) Pantry staples (e.g. yeast, sugar, flour, etc.)
b) Dairy products (e.g. cow’s milk, yoghurt, cheese, etc.)
c) Packaged foods or beverages (e.g. canned, frozen or bottled)
d) Fresh produce (e.g. fruits and vegetables)
e) Alcoholic beverages (e.g. wine, beer, spirits, etc.)
f) Fresh seafood (e.g. fish, mussels, shrimp, etc.)
g) Fresh meat (e.g. poultry, beef, pork, etc.)
h) Eggs

| | |
|---|---|
| Very difficult | 1 |
| Difficult | 2 |
| Easy | 3 |
| Very easy | 4 |
| Never shop for this type of food or beverage | 5 |
| Not sure | 99 |

9. To what extent do you agree or disagree with the following statements...

a) The last time I went shopping for groceries, I was able to find most of the items I was looking for

b) I trust that Canada's food supply chain will have enough food for Canadians during the new coronavirus or COVID-19 pandemic

| | |
|---|---|
| Strongly disagree | 1 |
| Disagree | 2 |
| Neither agree nor disagree | 3 |
| Agree | 4 |
| Strongly agree | 5 |
| Don't know/Prefer not to answer | 99 |

10. For each of the following possible ways to conduct grocery shopping, please indicate: all of the ways you conducted grocery shopping **prior** to COVID-19; all of the ways you have conducted grocery shopping **during** COVID-19; and all the way you expect you will conduct grocery shopping when the COVID-19 pandemic is **over**. Please select all that apply. [select all that apply]
    a) Before COVID-19
    b) During COVID-19
    c) When COVID-19 is over

| | |
|---|---|
| In a grocery store including big box stores that sell groceries (e.g. Sobeys, Loblaws, Walmart, Costco, etc.) | 1 |
| Online grocery shopping and delivery from a traditional grocery store | 2 |
| Ordering groceries online with express pick-up (e.g. PC Express or Walmart Online Grocery, etc.) | 3 |
| An online delivery service providing a "food box" containing ingredients and instructions for preparing a meal (e.g. HelloFresh, Goodfood, etc.) | 4 |
| At a farmers' market | 5 |
| Directly from a farmer at farm gate or via a Community Supported Agriculture (CSA) program | 6 |
| At specialty food stores (e.g. health food store, ethnic grocery store, etc.) | 7 |
| Other (SPECIFY) | 88 |
| Don't know/Prefer not to answer | 99 |

11. **Prior to the COVID-19 pandemic**, how often, if at all, did you do each of the following in a typical month? [randomize]

    a) Order take-out food that you pick up from a fast food or dine-in restaurant
    b) Receive food box/meal kits that provides you with the ingredients and instructions for preparing a meal (e.g. HelloFresh, Goodfood, etc.)
    c) Use a food delivery service that delivers food from a restaurant (e.g. Pizza, Uber Eats, Skip the Dishes, etc.)

| | |
|---|---|
| Never do this | 1 |
| Less than once a month | 2 |
| About once a month | 3 |
| 2-4 times a month | 4 |
| 5-10 times a month | 5 |

| | |
|---|---|
| More than 10 times a month | 6 |
| Don't know/Prefer not to answer | 99 |

12. **During the COVID-19 pandemic**, how often, if at all, did you do each of the following in a typical month? [randomize]

a) Order take-out food that you pick up from a fast food or dine-in restaurant
b) Receive food box/meal kits that provides you with the ingredients and instructions for preparing a meal (e.g. HelloFresh, Goodfood, etc.)
c) Use a food delivery service that delivers food from a restaurant (e.g. Pizza, Uber Eats, Skip the Dishes, etc.)

| | |
|---|---|
| Never do this | 1 |
| Less than once a month | 2 |
| About once a month | 3 |
| 2-4 times a month | 4 |
| 5-10 times a month | 5 |
| More than 10 times a month | 6 |
| Don't know/Prefer not to answer | 99 |

13. **Once the COVID-19 pandemic is over**, how often, if at all, do you do expect you will do each of the following in a typical month? [randomize]

a) Order take-out food that you pick up from a fast food or dine-in restaurant
b) Receive food box/meal kits that provides you with the ingredients and instructions for preparing a meal (e.g. HelloFresh, Goodfood, etc.)
c) Use a food delivery service that delivers food from a restaurant (e.g. Pizza, Uber Eats, Skip the Dishes, etc.)

| | |
|---|---|
| Never do this | 1 |
| Less than once a month | 2 |
| About once a month | 3 |
| 2-4 times a month | 4 |
| 5-10 times a month | 5 |
| More than 10 times a month | 6 |
| Don't know/Prefer not to answer | 99 |

14. How much would you estimate your household spends on groceries in a typical month? [numerical open-end]

| | |
|---|---|
| Don't know/Prefer not to answer | 99 |

15. Which, if any, of the following diets are you currently following? [randomize. Select all.]

| | |
|---|---|
| Raw (i.e. do not consume cooked foods) | 1 |

| | |
|---|---|
| Vegan (i.e. do not consume any meat or animal products including honey, gelatin, etc.) | 2 |
| Vegetarian (i.e. do not consume any meat) | 3 |
| Pescatarian (i.e. do not consume meat except for fish) | 4 |
| Flexitarian (i.e. consume a primarily plant-based diet but consume meat in moderation) | 5 |
| Carnivore (i.e. consume only meat and fish) | 6 |
| Keto diet (i.e. consume a high fat, low carbohydrate diet) | 7 |
| Low carb diet (i.e. consume a low carbohydrate diet) | 8 |
| Gluten free (i.e. do not consume foods containing gluten or wheat) | 9 |
| Calorie reduced diet (i.e. consume a limited number of calories per day) | 10 |
| Mediterranean diet (i.e. consume a diet rich in vegetables, fruits, nuts, whole grains, seafood and extra-virgin olive oil) | 11 |
| Dairy-free diet (i.e. do not consume dairy products such as milk, butter, etc.) | 12 |
| Intermittent fasting (i.e. do not eat during certain hours of the day) | 13 |
| Climatarian (i.e. choose foods based on carbon footprint/lower environmental impact) | 14 |
| Other (specify) | 88 |
| I do not currently follow any special diets [skip to q17] | 97 |
| Don't know/Prefer not to answer [skip to q31] | 99 |

16. Please rank the statements below based on what the main reasons you are following a specific diet are. [randomize. Select and rank in order of importance top 3]

| | |
|---|---|
| Trying to reduce environmental impact | 1 |
| Believe this diet is healthier | 2 |
| Trying to lose weight | 3 |
| Due to a food intolerance/allergy | 4 |
| Treatment of animals | 5 |
| Other (specify) | 88 |
| Don't know/Prefer not to answer | 99 |

## Food Sector

17. Generally speaking, what is your overall impression of Canada's agriculture and food sector?

| | |
|---|---|
| Very negative | 1 |
| Somewhat negative | 2 |
| Neutral | 3 |
| Somewhat positive | 4 |
| Very positive | 5 |
| Don't know/Prefer not to answer | 99 |

18. Generally speaking, how knowledgeable do you feel you are about Canada's agriculture and food sector?

| | |
|---|---|
| Not at all | 1 |
| Not very | 2 |
| Somewhat | 3 |

| | |
|---|---|
| Very | 4 |
| Don’t know/Prefer not to answer | 99 |

19. Canada’s agriculture and food sector includes farming/producing and food and beverage processing. How familiar would you say you are with each of the following? [randomize]

a) Farming/producing
b) Food and beverage processing

| | |
|---|---|
| Not at all familiar | 1 |
| Not very familiar | 2 |
| Somewhat familiar | 3 |
| Very familiar | 4 |
| Don’t know/Prefer not to answer | 99 |

20. To what extent do you agree or disagree with each of the following statements? [randomize.]
a) I am proud of the food and beverages that Canada produces.
b) I trust Canada’s farmers and ranchers.
c) Canada’s farmers and ranchers are a source of pride for our country.
d) Canada’s farmers are good stewards of the environment.
e) Canadian farming is environmentally responsible.
f) It is very important to ensure Canada’s agricultural sector is successful and growing.
g) Scientists have a clear understanding of the health effects of genetically modified foods.
h) I am more concerned today about genetically modified foods than I was 5 years ago.
i) The use of pesticides is a necessary part of food production.
j) I trust that farmers are using antibiotics responsibly in the care of their animals.
k) I feel that the Government of Canada is providing enough support to farmers to respond to the challenges posed by COVID-19.
l) I worry about the impact COVID-19 has had on Canada’s farmers.

| | |
|---|---|
| Strongly disagree | 1 |
| Disagree | 2 |
| Neither agree nor disagree | 3 |
| Agree | 4 |
| Strongly agree | 5 |
| Don’t know/Prefer not to answer | 99 |

21. How concerned, if at all, would you say you are about the availability of any of the following foods or food products due to the new coronavirus or COVID-19 pandemic? [randomize.]

a) Pantry staples (e.g. yeast, sugar, flour, etc.)
b) Dairy products (e.g. cow’s milk, yoghurt, cheese, etc.)
c) Packaged foods or beverages (e.g. canned, frozen or bottled)
d) Fresh produce (e.g. fruits and vegetables)
e) Alcoholic beverages (e.g. wine, beer, spirits, etc.)
f) Fresh seafood (e.g. fish, mussels, shrimp, etc.)
g) Fresh meat (e.g. poultry, beef, pork, etc.)

h) Eggs
i) Food grown or produced in Canada
j) Other, please specify: ______________________
k) Don't know/Prefer not to answer [exclusive]

| | |
|---|---|
| Not at all concerned | 1 |
| Slightly concerned | 2 |
| Somewhat concerned | 3 |
| Moderately concerned | 4 |
| Very concerned | 5 |
| Don't know/Prefer not to answer | 99 |

22. How concerned, if at all, would you say you are about each of the following in Canada? [randomize.]

a) The impact of agricultural activities on the environment
b) The affordability of food in Canada.
c) The use of seasonal foreign workers in the agriculture and food sector.
d) The use of hormones in farming.
e) The use of pesticides in farming.
f) The use of antibiotics in farming.
g) Treatment of animals on farms.
h) Genetically modified foods.
i) The safety of the food you have bought since the start of the coronavirus or COVID-19 pandemic.
j) The amount of food waste due to disruptions caused by COVID-19 (e.g. discarded milk).

| | |
|---|---|
| Very concerned | 1 |
| Moderately concerned | 2 |
| Somewhat concerned | 3 |
| Slightly concerned | 4 |
| Not at all concerned | 5 |
| Don't know/Prefer not to answer | 99 |

23. Please rank the statements below based on what would make you have the most pride in Canada's agriculture and food sector? [randomize. Select and rank in order of importance top 3]

Canada's agriculture and food sector…

| | |
|---|---|
| Produces healthy and nutritious foods | 1 |
| Takes care of the land and produces food in an environmentally sustainable way | 2 |
| Provides good livelihoods for farmers and workers in the food industry | 3 |
| Ensures affordable food grown in Canada is available year-round | 4 |
| Meets and exceeds food safety standards | 5 |
| Ensures high standards for animal care are in place and followed | 6 |
| Produces a wide range of high-quality foods | 7 |
| Other (specify) | 88 |
| None of the above [exclusive] | 98 |

| | |
|---|---|
| Don’t know/Prefer not to answer | 99 |

24. Which of the following sources do you use the most to gather information about Canada’s agricultural and food sector? You may select up to three. [select and rank in order of importance top 3]

| | |
|---|---|
| Doctors | 1 |
| Journalists/News media | 2 |
| Family/Friends | 3 |
| Farmers | 4 |
| Elected officials | 5 |
| Social media influencers/ Celebrities | 6 |
| Documentaries | 7 |
| Celebrity chefs | 8 |
| Scientists | 9 |
| Nutritionists | 10 |
| Grocery stores | 11 |
| Academics | 12 |
| Government of Canada | 13 |
| Non-profit organizations | 14 |
| Other (SPECIFY) | 88 |
| Don’t know/Prefer not to answer | 99 |

## Canadian Food

25. Which of the following matter most to you when shopping for food? You may select up to three. [select and rank in order of importance top 3] [alphabetize]

| | |
|---|---|
| Environmentally responsible | 1 |
| Organic | 2 |
| Free range or wild caught | 3 |
| Grass fed | 4 |
| Animal welfare approved | 5 |
| GMO-free | 6 |
| Vegetarian | 7 |
| Vegan | 8 |
| Price | 9 |
| Nutritional value | 10 |
| Quality | 11 |
| Taste | 12 |
| Food produced/grown in Canada | 13 |
| Other (SPECIFY) | 88 |
| None of the above | 98 |
| Don’t know/Prefer not to answer | 99 |

26. Generally speaking, what is your impression of the quality of the food and beverages produced/grown in Canada?

| | |
|---|---|
| Very poor quality | 1 |
| Poor quality | 2 |
| Average quality | 3 |
| Good quality | 4 |
| Excellent quality | 5 |
| Don’t know/Prefer not to answer | 99 |
| | |

27. To what extent do you agree or disagree with each of the following statements? [randomize]

a) There are enough Canadian food options available for purchase.
b) There are enough Canadian fruit and vegetable options (fresh, frozen or canned) available for purchase.
c) There are enough Canadian beverages (including alcoholic beverages) available for purchase.
d) When grocery shopping, I am willing to pay more for food and beverages that are produced/grown in Canada.
e) Since the COVID-19 pandemic, I have bought food and beverages produced in Canada more often.
f) Canadian grown/produced foods are affordable to buy.
g) Some food or beverage items I buy do not have a Canadian option available.
h) There are some food or beverage items I buy that Canada produces better than any other country.
i) Canadian grown/produced foods are better for the environment than imported foods.

| | |
|---|---|
| Strongly disagree | 1 |
| Disagree | 2 |
| Neither agree nor disagree | 3 |
| Agree | 4 |
| Strongly agree | 5 |
| Don’t know/Prefer not to answer | 99 |

28. How often do you look for food or beverages (including alcoholic beverages) produced/grown in Canada?

| | |
|---|---|
| Never | 1 |
| Rarely | 2 |
| Sometimes | 3 |
| Often | 4 |
| Always | 5 |
| Don’t know/Prefer not to answer | 99 |

29. [If look for Canadian food >never] When you are shopping for food and beverages (including alcoholic beverages) produced/grown in Canada, how easy or difficult do you feel it is to determine whether or not an item is Canadian?

| | |
|---|---|
| Very difficult | 1 |
| Difficult | 2 |
| Easy | 3 |

| | |
|---|---|
| Very easy | 4 |
| Don't know/Prefer not to answer | 99 |

30. And when you are shopping for each of the following specific types of food and beverages, how easy do you feel it is to determine whether each of the following foods are Canadian or from another country? [randomize]

a) Fresh produce (e.g. fruits and vegetables)
b) Packaged food and beverages (e.g. canned, frozen, bottled)
c) Alcoholic Beverages (e.g. wine, beer, spirits, etc.)
d) Fresh seafood (e.g. fish, mussels, shrimp, etc.)
e) Fresh meat (e.g. poultry, beef, pork, etc.)

| | |
|---|---|
| Never shop for this type of food or beverage | 0 |
| Very difficult | 1 |
| Difficult | 2 |
| Easy | 3 |
| Very easy | 4 |
| Don't know/Prefer not to answer | 99 |

31. When you are trying to determine whether or not a food or beverage is from Canada, how do you identify the country of origin? [select all that apply]

| | |
|---|---|
| Read the label | 1 |
| Signage at display | 2 |
| Talking to vendor/staff | 3 |
| Consult a vendor, restaurant, or product website | 4 |
| I buy directly from local farmers/growers | 5 |
| Other (specify) | 88 |
| Don't know/Prefer not to answer | 99 |

32. When purchasing the following foods or beverages, how often do you look specifically for an option that is produced/grown in Canada? [randomize]

a) Fresh produce (e.g. fruits and vegetables)
b) Packaged food and beverages (e.g. canned, frozen, bottled)
c) Alcoholic Beverages (e.g. wine, beer, spirits, etc.)
d) Fresh seafood (e.g. fish, mussels, shrimp, etc.)
e) Fresh meat (e.g. poultry, beef, pork, etc.)

| | |
|---|---|
| Never | 1 |
| Rarely | 2 |
| Sometimes | 3 |
| Often | 4 |
| Always | 5 |
| Never shop for this type of food or beverage | 98 |

| | |
|---|---|
| Don't know/Prefer not to answer | 99 |

## Food Policy

33. Do the terms "best before date" and "expiration date" mean the same thing or different things to you?

| | |
|---|---|
| They mean the same thing to me | 1 |
| They mean different things to me | 2 |
| Don't know/Prefer not to answer | 99 |

34. If an effort were made to reduce the amount of food wasted in Canada, how much responsibility would you assign to each of the following? [Randomize]

a) You personally
b) Grocery stores
c) Restaurants
d) Food and beverage companies
e) Farmers
f) The Government of Canada

| | |
|---|---|
| None at all | 1 |
| Not very much | 2 |
| Some | 3 |
| A lot | 4 |
| Don't know/Prefer not to answer | 99 |

35. How important do you feel it is to reduce the amount of food that is wasted in your household?

| | |
|---|---|
| Not at all important | 1 |
| Not very important | 2 |
| Somewhat important | 3 |
| Very important | 4 |
| Don't know/Prefer not to answer | 99 |

36. What are the main causes of food waste in your household? [select all.]

| | |
|---|---|
| Past expiry date | 1 |
| Food has turned bad/moldy/rotten | 2 |
| Too much was prepared/leftover | 3 |
| Eating out | 4 |
| Other (specify) | 88 |
| Don't know/Prefer not to answer | 99 |

37. What, if any, changes have you made in order to help reduce the amount of food waste in your household? [select all]

| | |
|---|---|
| Buying more packaged foods (i.e. stays fresh longer) | 1 |
| Meal planning | 2 |
| Buying only what I need | 3 |
| Eating home cooked meals more often | 4 |
| Creating a fridge or freezer inventory so I know which foods I have | 5 |
| Paying closer attention to expiry dates | 6 |
| Other (specify) | 88 |
| I have not made any changes to reduce the amount of food wasted in my household. | 99 |

## Demographics

The last few questions are strictly for statistical purposes. All of your answers are completely confidential.

38. Have you personally ….

    a) Been financially hurt by the coronavirus/COVID-19
    b) Had your hours of work reduced as a result of coronavirus/COVID-19
    c) Lost your job due to coronavirus/COVID-19
    d) Accessed any of the new government benefits designed to help deal with the impacts of coronavirus/COVID-19

| | |
|---|---|
| Yes | 1 |
| No | 2 |
| Don’t know/Prefer not to say | 9 |

39. How would you describe the area in which you live?

| | |
|---|---|
| Urban | 1 |
| Suburban | 2 |
| Rural | 3 |
| Prefer not to answer | 99 |

40. What is the language you speak most often at home?

| | |
|---|---|
| English | 1 |
| French | 2 |
| Other (specify) | 88 |
| Prefer not to answer | 99 |

41. In total, how many people (including you) live in your home?

| | |
|---|---|
| 1 (live alone) | 1 |
| 2 | 2 |
| 3 | 3 |
| 4 or more | 4 |
| Prefer not to answer | 99 |

42. [IF >1] How many people under the age of 18 live in your home? [verify mathematic possibility]

| | |
|---|---|
| None | 0 |
| 1 | 1 |
| 2 | 2 |
| 3 | 3 |
| 4 or more | 4 |
| Prefer not to answer | 99 |

43. What is your marital status?

| | |
|---|---|
| Single | 1 |
| Married/living with someone/common law | 2 |
| Separated/divorced | 3 |
| Widowed | 4 |
| Other | 5 |
| Prefer not to answer | 99 |

44. What is the highest level of schooling that you have completed?

| | |
|---|---|
| Grade 8 or less | 1 |
| Some high school | 2 |
| High school diploma or equivalent | 3 |
| Registered apprenticeship or other trades certificate or diploma | 4 |
| College, CEGEP or other non-university certificate or diploma | 5 |
| University certificate or diploma below bachelor's level | 6 |
| Bachelor's degree | 7 |
| Post graduate degree above bachelor's level | 8 |
| Prefer not to answer | 99 |

45. Which of the following best describes your current employment status?

| | |
|---|---|
| Working full-time, that is, 30 or more hours per week | 1 |
| Working part-time, that is, less than 30 hours per week | 2 |
| Self-employed | 3 |
| Unemployed, but looking for work | 4 |
| A student attending school full-time | 5 |
| A student attending school part-time | 6 |
| Retired | 7 |
| Not in the workforce (full-time homemaker, unemployed, not looking for work) | 8 |
| Prefer not to answer | 99 |

46. Were you born in Canada?

| | |
|---|---|
| Yes | 1 |
| No | 2 |
| Prefer not to answer | 99 |

47. Do you identify as any of the following? [select all that apply]

| | |
|---|---|
| An Indigenous person, that is, First Nations, Métis or Inuk (Inuit) | 1 |
| A member of an ethno-cultural or a visible minority group | 2 |
| A member of the LGBTQ2 community | 3 |
| None of the above | 4 |
| Prefer not to answer | 99 |

48. [if member of ethno-cultural or visible minority group] Of which ethno-cultural or visible minority group or groups are you a member? [select all that apply]

| | |
|---|---|
| South Asian (e.g., East Indian, Pakistani, Sri Lankan, etc.) | 1 |
| Chinese | 2 |
| Black | 3 |
| Filipino | 4 |
| Latin American | 5 |
| Arab | 6 |
| Southeast Asian (e.g., Vietnamese, Cambodian, Malaysian, Laotian, etc.) | 7 |
| West Asian (e.g., Iranian, Afghan, etc.) | 8 |
| Korean | 9 |
| Japanese | 10 |
| Other (SPECIFY) | 88 |
| Prefer not to answer | 99 |

49. What are the first three digits of your postal code?

[insert first three digits of postal code. Format a1a]
Prefer not to answer 99

50. Which of the following categories best describes your total household income for 2019? That is, the total income of all persons in your household combined, before taxes.

| | |
|---|---|
| Under $20,000 | 1 |
| $20,000 to just under $40,000 | 2 |
| $40,000 to just under $60,000 | 3 |
| $60,000 to just under $80,000 | 4 |
| $80,000 to just under $100,000 | 5 |
| $100,000 to just under $150,000 | 6 |
| $150,000 and above | 7 |
| Prefer not to answer | 99 |

51. [For respondents living outside Quebec or New Brunswick] Do you consider yourself to be a member of a Francophone minority community in your province or territory? (A Francophone minority community refers to Francophones who are living in French-speaking communities outside of Quebec or New Brunswick.)

| | |
|---|---|
| Yes | 1 |
| No | 2 |
| Prefer not to answer | 99 |

52. [For respondents living in Quebec] Do you consider yourself to be a member of an Anglophone minority community? An Anglophone minority community refers to Anglophones who are living in an English-speaking community in the province of Quebec.

| | |
|---|---|
| Yes | 1 |
| No | 2 |
| Prefer not to answer | 99 |

This concludes the survey. Thank you for your participation!