Agriculture and Agri-Food Canada    Agriculture et Agroalimentaire Canada

# AAFC Canadian Consumers Survey – Wave II (2023) Quantitative Research Report

Prepared for Agriculture and Agri-Food Canada

Supplier name: Earnscliffe Strategy Group
Contract number: CW2331278
Contract value: $79,693.25
Award date: September 21, 2023
Delivery date: February 16, 2024

Registration number: POR 054-23
For more information on this report, please Agriculture and Agri-Food Canada at:
aafc.info.aac@agr.gc.ca

Cette publication est aussi disponible en français.

Canada

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February 2024

This public opinion research report presents the results of an online survey, focus groups and in-depth interviews conducted by Earnscliffe Strategy Group on behalf of Agriculture and Agri-Food Canada. The fieldwork was conducted in December 2023.

Cette publication est aussi disponible en français sous le titre : Sondage auprès des consommateurs canadiens de 2023-2024 (vague II) : rapport final



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1341 Baseline Road
Ottawa, ON K1A 0C5

Catalogue Number: A22-684/2024E-PDF
International Standard Book Number (ISBN): 978-0-660-70216-2
AAFC number: 13190E
Related publications (registration number: POR – 054-23)
Catalogue Number: A22-684/2024F-PDF (Final report, French)
International Standard Book Number (ISBN): 978-0-660-70217-9

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# Executive summary

## Earnscliffe Strategy Group (Earnscliffe) is pleased to present this report to Agriculture and Agri-Food Canada (AAFC) summarizing the results of quantitative research undertaken to understand how consumer attitudes have evolved over the past few years.

Budget 2019 committed an investment of $25 million over five years for Agriculture and Agri-Food Canada (AAFC) under the Food Policy to "make Canadian food the top choice at home and abroad"; known as the AgriCommunication initiative.

In 2020, Earnscliffe conducted the first wave of this research, "2020 Buy Canadian Promotion Campaign Baseline Survey"; a baseline survey to understand consumer perceptions and to inform a marketing campaign to enhance public trust and increase appreciation and pride in the contribution of farmers and the food industry. This was an online survey of 2,005 Canadians aged 18 and older who hold at least some of the household grocery buying responsibility. The survey was conducted between July 28th and August 3rd, 2020, in English and French, according to respondents' preference.

At this time, AAFC would like to assess whether consumer attitudes have evolved. The objective of the research is to assess consumer attitudes over the duration of the AgriCommunication Initiative. This phase of research will be used to evaluate the effectiveness of the AgriCommunication Initiative and support the objective to share information and engage with the agriculture and agri-food sector about the evolving expectations/behaviours of Canadian consumers. The contract value for this project was $79,693.25 including HST.

The specific objectives of the research were to explore:

- Consumer grocery shopping frequency, behaviours and preferences including deciding factors, impressions, and desirability of Canadian grown and produced foods, as well as how consumers determine whether something is Canadian made.
- 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.
- Views on household food waste in Canada including concerns, causes and potential solutions.

To meet these objectives, Earnscliffe was retained to conduct a nationally representative online survey of 2,011 Canadian adults between December 8th and 14th, 2023, in both English and French. All respondents were 18 years or older and responsible for at least some of a household's grocery shopping. The survey took an average of 15 minutes to complete. A full description of the sample frame, data cleaning process, and weighting are outlined in the Quantitative Methodology Report (Appendix A). The questionnaire used is provided in Appendix B. Since a sample drawn from an Internet panel is non-probabilistic in nature, the margin of error cannot be calculated for this survey.

The key findings of this research are presented below including key tracking results where questions from the 2020 survey were repeated.

## Impressions of Canada's agriculture and food sector

- Canadians remain far more likely to have a positive than a negative impression of Canada's agriculture and food sector, though the number who say they have a positive impression is down 10% (61% versus 72%).

- Compared to 2020, there has been a 12% drop in those who believe they are somewhat knowledgeable with Canada's agriculture and food sector, and a corresponding increase in the proportion feeling they are not very knowledgeable (42% versus 29%).

- The data show that knowledge and impression are highly and positively correlated. The more knowledgeable of the sector one feels they are, the more favourable an opinion they tend to hold of it. This positive correlation means that cultivating higher levels of knowledge will likely help to maintain a high degree of favourable opinion towards the sector.

- Familiarity with both farming and ranching (45%, down 9%), as well as food and beverage processing and manufacturing (38%, down 4%), has softened since 2020.

- Most respondents (88%) feel that farmers and ranchers are at least moderately trustworthy, and the majority feel the same of food and beverage manufacturers (68%) and retailers (59%). While few hold a negative opinion on trustworthiness of farmers and ranchers, 37% feel that food and beverage retailers are not very or not at all trustworthy.

- Between half and two-thirds of respondents trust farmers in the care of their animals (66%) and in their use of fertilizers and pesticides (54%).

- A strong majority of respondents agree that it is important that Canada's agriculture is growing and successful (84%, down 3%), Canada's farmers and ranchers are a source of pride (74%, down 3%), and that they are proud of the food and beverages produced in Canada (68%, down 10%). Compared with 2020, the number of respondents who agree with each has fallen.

- A slight majority agree that Canadian farmers are good stewards of the environment (56%, down 2%) and that Canadian farming is environmentally responsible (52%, down 2%).

- More respondents disagree than agree that genetically modified foods do not pose any risks to their health (38% versus 27%) and that Canadian food and beverage retailers are trying to stabilize food prices (44% versus 20%).

- Respondents were shown a list of ten potential areas of concern in Canada's agriculture and food sector and were asked to rate their level of concern with each. Concern is notable for each, with at least four-in-ten respondents who say they are moderately or very concerned.

    - Among all areas tested, three areas stand out in terms of level of concern. A strong majority of respondents say they are concerned with the affordability of food in Canada (80%, up 29%), the amount of food wasted (71%), and the impact of plastic packaging on the environment (60%).

- Compared to 2020, the proportion of respondents who say they are concerned has risen among every measure tested. Notably, level of concern about the affordability of food has risen 29% (from 51% in 2020 to 80% in 2023).

## Impressions of Canadian food

- Compared to 2020, fewer respondents feel that the quality of food and beverages from Canada is excellent (17%, down 16%), and more now feel it is average (24%, up 11%).
- Over half of respondents (58%, down 5%) agree that Canadian produced foods are better for the environment than imported foods.
- Fewer respondents agree that there are enough Canadian produced food options available (44%, down 11%) or are willing to pay more for foods produced in Canada (36%, down 13%).
- More respondents disagree than agree that Canadian produced foods are affordable to buy (36% versus 25%).
- Up since 2020, half of respondents say they sometimes (34%, up 3%) or rarely (16%, up 5%) look for food and beverages from Canada. Four-in-ten say they always (9%, down 5%) or often (32%, down 6%) do so. Conversely, 6% (up 1%) say they never seek out Canadian produced food and beverages.
- Looking at the specific products produced in Canada, fewer respondents this year say they always or often purchase them. Fresh meat (51%, down 8%) and produce (50%, down 12%) remain the Canadian product sought out most often.
- Nearly six-in-ten (58%, down 3%) respondents believe that it is easy to identify food and beverages that are produced in Canada, which represents no meaningful change since 2020.
- Most respondents (83%, down 4%) say they read the product label to determine whether a food or beverage is from Canada. Fewer use signage at a given display (42%, down 4%) or buy locally (14%, down 3%).

## Views related to food policy

- The majority (62%) of respondents believe that the best before and expiration dates mean different things to them, which is consistent with 2020 (61%).
- Increasing 6% since 2020, one-quarter of respondents (25%) say they have little or no food waste in their household.

- Only one-in-ten respondents (9%) say they have not made any changes to reduce their food waste. Conversely, the most common changes made are eating home cooked meals more often (44%), making a grocery list (43%), and meal planning (41%).

- Among those who say they have made changes to reduce food waste, the majority (60%) have done so over economic concerns, while fewer say moral (23%) or environmental (13%) concerns were the main catalyst.

## Factors driving purchase decisions

- The vast majority of respondents (72%) say that while price is usually an important factor in their purchase decisions, there are also other important factors.

- Among those for whom price is not usually the only factor, a majority say quality (76%), taste (69%), and nutritional value (54%) are among the top five factors that drive their food purchase decisions. Proximity is also an important factor, with Canadian (33%) and locally (30%) produced and grown foods making up the top-five for three-in-ten respondents.

- Among those for whom price is not usually the only factor, when given 100 points to allocate to their most important factors (up to 6) that drive purchase decisions, the average respondent gives price (at 39) nearly twice as many points as any other factor. Rounding out the top five factors based on average point allocation are being vegan or vegetarian (21), taste (20), quality (19), and nutritional value (18).

- Only 2% of respondents say they are not concerned about rising food prices. Conversely, seven-in-ten respondents say they are concerned about the rising price of fresh meat (70%) and produce (69%), while half are concerned about the rising cost of dairy (50%).

- The average household spends $580 on food per month; however, more spend $500 or less (50%) than spend more than $600 (28%).

- Three-in-ten respondents (29%) claim to eat a special diet, including nearly one-in-ten who eat a reduced-meat diet (9%), or plant-based diet (7%). Dairy- and gluten-free diets are also common (6%).

- Among those who have a special diet, one-in-five (20%) do so to accommodate an intolerance, allergy, or believe it is healthier (18%).

- Among all the behaviours tested, those that satisfy an intention of saving money or reducing waste are the most common among respondents, including checking flyers (56%), trying to reduce their monthly grocery bill (56%), and being careful about buying and preparing food to reduce waste (47%).

Research firm: Earnscliffe Strategy Group (Earnscliffe)
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Contract value: $79,693.25
Contract award date: September 21, 2023

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: Date: February 23, 2024

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 quantitative research undertaken to understand how consumer attitudes have evolved over the past few years.

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# Detailed findings

This report is divided into four main sections: Impressions of Canada's agriculture and food sector, Impressions of Canadian food, Views related to food policy, and Factors driving purchase decisions. Each section is home to data tables illustrating tracking data (where available), data broken down by generations (where there are significant findings), and by the segmentation explained below (and where applicable).

The textual analysis which speaks directly to these data tables can be found above the relevant exhibit numbers. Where there are additional points of interest which pertain to a specific question but are not contained in the data table itself (for example, regional variations, difference by income), textual analysis is included below the table in question.

Throughout the report, the abbreviation "DK/NR" represents responses of either "don't know" or "prefer not to respond." It is also worth noting that percentages may not add up to 100% due to rounding. As mentioned above, results from the 2020 Buy Canadian Promotion Campaign research have been included to understand how, if at all, consumer attitudes have changed over the past three years.

Where statistically significant results exist, tables have been included which detail survey results broken down by generational age categories. They are defined as follows:

- Gen Z: 18 to 26 years of age;
- Gen Y (also known as Millennials): 27 to 42 years of age;
- Gen X: 43 to 57 years of age; and
- Baby Boomers: 58 to 77 years of age.

In the text of the report, unless otherwise noted, differences highlighted are statistically significant at the 95% confidence level. The statistical test used to determine the significance of the results was the Z-test when comparing percentages and the T-test when comparing averages/means.

## A. Impression of Canada's agriculture and food sector

### Familiarity, knowledge, and impression of Canada's agriculture and food sector

This study was designed to investigate respondents' familiarity, knowledge, and impression of Canada's agriculture and food sector. To begin, respondents were asked how familiar they are with the sector broadly speaking, as well as with farming and ranching, and food and beverage processing and manufacturing more specifically.

Compared to 2020, when the last wave of this study was conducted, there has been a 12% (43% versus 55%) drop in those who feel they are at least somewhat knowledgeable about Canada's agriculture and food sector. There has been a corresponding increase in the proportion feeling they are not very knowledgeable (42% versus 29%).

Exhibit A1 – FS2. Generally speaking, how knowledgeable do you feel you are about Canada's agriculture and food sector?
Base: All respondents

| Column % | 2023 | 2020 |
|---|---|---|
| % Very/Somewhat | 50% | 63% |
| Very | 7% | 8% |
| Somewhat | 43% | 55% |
| Not very | 42% | 29% |
| Not at all | 5% | 5% |
| DK/NR | 3% | 3% |
| Sample size | 2011 | 2005 |

Compared with 2020, familiarity with both farming and ranching (45% versus 54%), as well as food and beverage processing and manufacturing (38% versus 42%), has declined – down 9% and 4% respectively.

Exhibit A2 – FS3. Canada's agriculture and food sector includes farming/ranching, and food and beverage processing/manufacturing. How familiar would you say you are with each of the following? % Familiar
Base: All respondents

| Column % | 2023 | 2020 |
|---|---|---|
| Farming/ranching | 45% | 54% |
| Food and beverage processing/manufacturing | 38% | 42% |
| Sample size | 2011 | 2005 |

Respondents remain far more likely to have a positive (61%) than a negative (10%) impression of Canada's agriculture and food sector, though the number who say they have a positive impression is down (61% versus 72%). The most significant decline is attributed to fewer respondents who say they have a very positive impression of Canada's agriculture and food sector (18% versus 34%).

Exhibit A3 – FS1. Generally speaking, what is your overall impression of Canada's agriculture and food sector?
Base: All respondents

| Column % | 2023 | 2020 |
|---|---|---|
| % Positive | 61% | 72% |
| Very positive | 18% | 34% |
| Somewhat positive | 44% | 38% |
| Neutral | 25% | 21% |
| Somewhat negative | 7% | 4% |
| Very negative | 3% | 1% |
| DK/NR | 4% | 3% |
| Sample size | 2011 | 2005 |

When analyzing knowledge of the agriculture and food sector through the lens of a respondents' favourability towards it, two very important strategic findings emerge.

First, the two variables are correlated: the more knowledgeable of the sector one feels they are, the more favourable an opinion they tend to hold of it. This should be seen as an encouraging correlation. If the inverse were true, the challenge for improving perceptions would be significantly more difficult as the people holding the least favourable impressions would be the people who are the most likely to think they already know everything they need to know about the sector. As a result, they could be potentially less receptive to positive messages about the sector if that challenges their current way of thinking. This positive correlation means that cultivating higher levels of knowledge will likely help to maintain a high degree of favourable opinion towards the sector.

Second, these two variables can be combined to divide the population into four distinct segments that each present unique strategic considerations.

Currently, more than a third of the population (37%) are what we might call Champions of the sector. These are those who provide top-two-box responses on both their level of knowledge of the sector, as well as their impression of the sector. Given that this is the most desirable combination of opinions from the sector's perspective, it is worth monitoring. It is also a segment that could be leveraged to spread their informed positivity to others.

The next segment, the Benign Unfamiliars, represents a quarter of the population (24%) – people who do not describe themselves as top-two-box knowledgeable but who nevertheless give the sector the benefit of the doubt and rate it favourably. Their opinions do not need to be altered but providing them with a greater sense of knowledge about a sector to which they are favourably inclined could help them become more solid in their feelings and potentially "upgrade" them to being champions who confidently defend or endorse the sector.

The third segment, the Unconvinced Unfamiliars, represent about a quarter of the population (26%). These are people who do not feel knowledgeable about the sector and refrain from providing favourable impressions. That is not to say they hold negative opinions of the sector. In fact, 67% of this group rate their impression as neutral and another 15% do not even offer a rating, leaving only 18% of this segment as actually feeling negatively towards the sector. With the clear correlation between knowledge and favourability, the strategic imperative would be to target these Canadians with knowledge-building strategies. From other research, this segment of society may include people who are less inclined to take in information on such topics, but the potential for cultivating a favourable impression nonetheless remains.

Finally, the fourth segment is the most challenging from the sector's perspective but, at 13%, is the smallest. These are Canadians who can be considered Confident Critics. They think of themselves as knowledgeable about the sector and do not hold a favourable impression of it. While they do not all hold negative views, two-in-five of them (38%) do making them decidedly the most negative segment of society. Strategically, while it is preferrable to try to reduce the size of any segment with this combination of feelings, it is perhaps unrealistic to be completely bereft of critics. As a result, minimizing this segment should be the aim.

When comparing the segment sizes in the current survey with 2020, the data shows an erosion of the most desirable segment (by 14%) – which fits with the tracking data on both variables – but absolutely no increase in the size of the most challenging segment. Taken together this suggests that over these past few years, fewer Canadians feel that they are knowledgeable of the agriculture and food sector and that this has, in turn, impacted favourable impressions. This shift has not resulted in a growth in the number of Confident Critics, however.

As mentioned, the Champions segment shrunk from 50% in 2020 to the 37% currently measured. All the growth was measured in two segments, with Benign Unfamiliars increasing from 21% to 24% and the Unconvinced Unfamiliars segment growing by 10% to 26%. As stated above, there was absolutely no change in the number of Confident Critics, holding steady at 13%.

Exhibit A4 – Strategic segmentation
Base: All respondents

| Column % | 2023 | 2020 |
|---|---|---|
| Champions | 37% | 51% |
| Benign Unfamiliars | 24% | 21% |
| Unconvinced Unfamiliars | 26% | 16% |
| Confident Critics | 13% | 13% |
| Sample size | 2011 | 2005 |

Demographically, each segment has a profile that is not terribly dissimilar from the national one, but there are a few skews worth highlighting. Champions are more likely than average to be aged 65 or older, to live in Ontario or any of the three prairie provinces, and to be male. Benign Unfamiliars skew 45-64 years old and live in B.C. or east of Ontario. Unconvinced Unfamiliars are the youngest segment, skewing under 45 years old, female, tend to live alone, and are more price driven. Confident Critics skew 55-64, Alberta and Ontario, live with more people in their household, and are price driven.

For a few questions below, results will be given by each of these segments, demonstrating that the segment sometimes represents a consistent tendency to feel one way or another, but also showing that on a few key variables, all four segments tend to hold the same opinion.

With this segmentation in mind, in the next questions respondents were asked whether they agree or disagree with the idea that it is important to ensure that Canada's agricultural sector is successful and growing. The overall number who say they strongly agree declined 6% from 2020 – a drop which was partially counterbalanced by an increase of 3% in those who agree with it.

Of note, this is one question that all Canadians tends to agree on regardless of the strategic segment to which they belong. While 92% of Champions and 90% of the Benign Unfamiliars agree with this sentiment, fully three quarters of the Unconvinced Unfamiliars (73%) and Confident Critics (75%) also share this point of view, although with less strength.

Exhibit A5 – FS6C. It is very important to ensure Canada's agricultural sector is successful and growing - To what extent do you agree or disagree with each of the following statements?
Base: All respondents

| Column % | 2023 | 2020 |
|---|---|---|
| % Agree | 84% | 87% |
| Strongly agree | 45% | 51% |
| Agree | 39% | 36% |
| Neither agree nor disagree | 10% | 9% |
| Disagree | 2% | 1% |
| Strongly disagree | 1% | 1% |
| DK/NR | 3% | 2% |
| Sample size | 2011 | 2005 |

Broken down by region, those in Atlantic Canada (90%) and Alberta (88%) are the most likely to agree or strongly agree with the importance of growing Canada's agricultural sector.

## Public trust and pride

In 2020 respondents were asked to what extent they agree or disagree with the statement that they trust Canada's farmers and ranchers – to which almost three quarters (73%) said they either agreed or strongly agreed. In this wave, the question was asked slightly differently and instead directly asked how trustworthy respondents felt Canadian farmers and ranchers are. When posed this way, almost nine-in-ten (88%) say they think farmers and ranchers are at least moderately trustworthy.

This year, respondents were also asked about levels of trust in food and beverage manufacturers as well as food and beverage retailers. While not the same levels of overall agreement, the majority nonetheless say that food and beverage manufacturers (68%) and food and beverage retailers (59%) are at least moderately trustworthy.

That being said, there are variations in the strength of this trust with respondents being significantly more likely to say that farmers and ranchers are very trustworthy (42%) than they are to say the same of food and beverage manufacturers (11%) or food and beverage retailers (9%).

And while a majority still say that food and beverage manufacturers and retailers are at least moderately trustworthy, an important minority say they are either not very or not at all trustworthy (25% and 37% respectively).

Exhibit A6 – FS4. Please rate your level of trust or distrust with each of the following?
Base: All respondents

| Column %<br>Column Comparisons | Farmers and ranchers | Food and beverage manufacturers | Food and beverage retailers |
|---|---|---|---|
| Very trustworthy | 42% | 11% | 9% |
| Moderately trustworthy | 46% | 57% | 50% |
| Not very trustworthy | 6% | 20% | 26% |
| Not at all trustworthy | 2% | 5% | 11% |
| DK/NR | 6% | 7% | 4% |
| Sample size | 2011 | 2011 | 2011 |

Interestingly, the strategic segments all have strong majorities rating farmers and ranchers top-two-box on trustworthiness, but there is considerable drop-off in trust of food and beverage manufacturers and processors as well as with food and beverage retailers across all segments. One distinguishing factor is that strong majorities of Champions trust any part of the agriculture and food sector tested whereas Confident Critics are much less inclined to have that feeling for any part of the sector.

There is some generational variation as well, with Baby Boomers being more trusting of farmers and ranchers and food and beverage manufacturers whereas Generation Z is more trusting of food and beverage retailers.

Exhibit A7 – FS4. Please rate your level of trust or distrust with each of the following?
%Very/Moderately trustworthy
Base: All respondents

| Column % | Total | Gen Z | Gen Y | Gen X | Baby Boomers |
|---|---|---|---|---|---|
| Farmers and ranchers | 87% | 80% | 83% | 88% | 92% |
| Food and beverage manufacturers | 68% | 63% | 68% | 66% | 71% |
| Food and beverage retailers | 59% | 64% | 60% | 56% | 58% |
| Sample size | 2011 | 274 | 524 | 518 | 633 |

Although overall levels of trust in farmers and ranchers remains high across Canada, at just under half (47%) of respondents from Quebec are the most likely to say they are very trustworthy. Of note respondents from Quebec were also the most likely to say that food and beverage retailers are very trustworthy, albeit at a much lower rate (13%). Food and beverage retailers also gain higher overall levels of trust among those who were not born in Canada than those who were (65% versus 57%).

Many of the responses found in this study may be informed by the current context of affordability of food in Canada. When asked to rate their concern over the affordability of food, eight-in-ten (80%) say they are either moderately (19%) or very concerned (61%); a 29% increase over 2020. Indeed, twice as many respondents this year say they are very concerned about the affordability of food in Canada, compared to 2020 (61% versus 30%).

Exhibit A8 – FS7C. The affordability of food in Canada - How concerned, if at all, would you say you are about each of the following in Canada?
Base: All respondents

| Column % | 2023 | 2020 |
|---|---|---|
| % Very/Moderately concerned | 80% | 51% |
| Very concerned | 61% | 30% |
| Moderately concerned | 19% | 22% |
| Somewhat concerned | 12% | 22% |
| Slightly concerned | 4% | 16% |
| Not at all concerned | 1% | 8% |
| DK/NR | 2% | 2% |
| Sample size | 2011 | 2005 |

While it might be expected that those with lower household incomes might be more concerned about affordability, this does not appear to be the case with concerns over affordability remaining as high among those with higher household incomes. To this point, overall levels of concern with the affordability of food remains high across income brackets, including among those with annual incomes under $60k (80%), between $60-80k (81%), as well as over $100k (79%).

Despite high levels of overall affordability concerns across large segments of society, there are some communities which appear to be feeling greater pressure than others. Roughly three quarters of those who identify as part of the 2SLGBTQI+ community (72%) or as living with a disability (76%) say they are very concerned – this compared with 61% of the general population.

If it appears clear that Canadians see the affordability of food as an issue, respondents are less clear on whether food and beverage retailers are making an effort to stabilize prices. Only 21% of Canadians agree that, yes, retailers are attempting to stabilize prices – with agreement more strongly held among younger generations.

Exhibit A9 – FS6D. To what extent do you agree or disagree with each of the following statements? % Agree
Base: All respondents

| Column % | Total | Gen Z | Gen Y | Gen X | Baby Boomers |
|---|---|---|---|---|---|
| Canadian food and beverage retailers are making an effort to stabilize prices | 21% | 31% | 26% | 20% | 14% |
| Sample size | 2011 | 274 | 524 | 518 | 633 |

There is some regional variation in perceptions of retailers' attempts to stabilize prices. At three-in-ten (29%), those hailing from Saskatchewan and Manitoba are the most likely to agree or strongly agree that retailers are attempting to stabilize prices. This compared with Ontario and Quebec where only 19% say the same and, conversely, almost half (47%) say they disagree or strongly disagree with this statement. Of note, the number of those who disagree rises to half of respondents (51%) from rural regions.

Despite this affordability pressure, pride in Canada's farmers and ranchers, as well as the food and beverages produced in Canada, remains high which suggests producers are not the ones being blamed on affordability. Nearly three-quarters (74%) – roughly the same number as in 2020 (down 3%) – of respondents believe Canada's farmers and ranchers are a source of pride for our country. Just over two-thirds (68%) are proud of the food and beverages that Canada produces.

Exhibit A10 – FS6A & FS6C. To what extent do you agree or disagree with each of the following statements? % Agree
Base: All respondents

| Column % | 2023 | 2020 |
|---|---|---|
| Canada's farmers and ranchers are a source of pride for our country | 74% | 77% |
| I am proud of the food and beverages that Canada produces | 68% | 78% |
| Sample size | 2011 | 2005 |

Across the generations, older Canadians (Baby Boomers and Gen X) have higher levels of pride in both.

Exhibit A11 – FS6A & FS6C. To what extent do you agree or disagree with each of the following statements? % Agree
Base: All respondents

| Column % | Total | Gen Z | Gen Y | Gen X | Baby Boomers |
|---|---|---|---|---|---|
| Canada's farmers and ranchers are a source of pride for our country | 74% | 65% | 68% | 75% | 81% |
| I am proud of the food and beverages that Canada produces | 68% | 59% | 63% | 70% | 73% |
| Sample size | 2011 | 274 | 524 | 518 | 633 |

While respondents in Alberta are the most likely to strongly agree (34%) with the idea that Canada's farmers and ranchers are source of pride, overall levels of agreement with this statement are highest in Atlantic Canada (80%) and Quebec (77%).

## Farming practices, the environment, and sustainability

On the environmental impact of Canadian farming, the trend remains relatively stable when compared with 2020 with just over half saying that Canada's farmers are good stewards of the environment (56%, down slightly from 58% in 2020) and that Canadian farming is environmentally responsible (52%, down slightly from 54% in 2020).

Exhibit A12 – FS6E & FS6F. To what extent do you agree or disagree with each of the following statements? % Agree
Base: All respondents

| Column % | 2023 | 2020 |
|---|---|---|
| Canada's farmers are good stewards of the environment | 56% | 58% |
| Canadian farming is environmentally responsible | 52% | 54% |
| Sample size | 2011 | 2005 |

While the overall numbers remain stable when compared with 2023, this hides generational differences in the perception of the environmental impact of Canadian farming, with those in the Generation X and Baby Boomer generations being more likely to agree Canadian farmers are good stewards of the environment (58% and 61%) and that Canadian farming is environmentally responsible (55% and 56%) than those in younger generations.

Exhibit A13 – FS6E & FS6F. To what extent do you agree or disagree with each of the following statements? % Agree
Base: All respondents

| Column % | Total | Gen Z | Gen Y | Gen X | Baby Boomers |
|---|---|---|---|---|---|
| Canada's farmers are good stewards of the environment | 56% | 52% | 51% | 58% | 61% |
| Canadian farming is environmentally responsible | 52% | 45% | 49% | 55% | 56% |
| Sample size | 2011 | 274 | 524 | 518 | 633 |

There is an interesting regional dynamic in that respondents from Quebec were the most likely to say that farmers and ranchers are very trustworthy, yet they are also the least likely to say they agree that Canada's farmers are good stewards of the environment (at 48% overall agreement). This suggests that this trust is not strictly linked to a perceived environmental impact.

Additionally, there is a correlation between dietary preferences and perceptions of whether Canada's farmers are good stewards of the environment: those who eat reduced meat or plant-based diets are the most likely to disagree or strongly disagree (at 11% and 18% respectively) that Canadian farmers are good stewards of the environment, whereas those who specify they are on a meat-based diet are the most likely to strongly agree with the same idea (at 23%).

When asked how concerned they are about the impact of agricultural activities on the environment, four-in-ten (41%) respondents say they are very (18%) or moderately concerned

(23%). While more respondents say they are moderately concerned this year (23% versus 20%), fewer say they are slightly (18% versus 21%) or not at all concerned (11% versus 15%).

Exhibit A14 – FS7A. The impact of agricultural activities on the environment - How concerned, if at all, would you say you are about each of the following in Canada?
Base: All respondents

| Column % | 2023 | 2020 |
|---|---|---|
| % Very/Moderately concerned | 41% | 38% |
| Very concerned | 18% | 18% |
| Moderately concerned | 23% | 20% |
| Somewhat concerned | 24% | 22% |
| Slightly concerned | 18% | 21% |
| Not at all concerned | 11% | 15% |
| DK/NR | 6% | 4% |
| Sample size | 2011 | 2005 |

On the levels of concern for the impact of agricultural activities on the environment, the highest rates registered regionally are in Quebec where almost half (48%) say they are either moderately or very concerned. British Columbians and Albertans, on the other hand, are the most likely to say they are not at all concerned (at 16% and 17% respectively).

Further nuancing this picture, respondents in urban areas are the most likely to say they are moderately or very concerned (44%) whereas those in rural areas are the most likely to say they are not at all concerned (19%).

When asked about their level of trust in farmers' farming practices, levels of agreement ranged. On the high end, two thirds (66%) agreed that farmers take the health and well-being of their animals seriously. On the other end of the spectrum, half (50%) agree that farmers are using pesticides (herbicides, fungicides, insecticides) responsibly.

Worth noting, on the one measure tracked year over year, the same number of respondents this year trust that farmers are using antibiotics responsibly in the care of their animals (53%) as in the previous wave of this study (52%). Across the generations, Baby Boomers are more trusting of farmers' practices than others.

Exhibit A15 – FS5. To what extent do you agree or disagree with each of the following statements? % Agree
Base: All respondents

| Column % | Total | Gen Z | Gen Y | Gen X | Baby Boomers |
|---|---|---|---|---|---|
| I trust that farmers take the health and well-being of their animals seriously | 66% | 52% | 60% | 66% | 75% |
| I trust that farmers are using fertilizers responsibly | 54% | 47% | 48% | 54% | 62% |
| I trust that farmers are using antibiotics responsibly in the care of their animals | 53% | 50% | 51% | 52% | 57% |
| I trust that farmers are using pesticides (herbicides, fungicides, insecticides) responsibly | 50% | 49% | 44% | 49% | 56% |
| Sample size | 2011 | 274 | 524 | 518 | 633 |

As touched on elsewhere, respondents from Alberta appear to represent a distinct perspective on a range of issues. On the responsible use of antibiotics in livestock, for example, Albertans are the most likely to agree or strongly agree at more than three-in-five (62%). This is equally true of trust in the responsible use of pesticides where respondents from Alberta are the most likely to agree at 58%.

Despite the overall trust in farmers and farming practices more generally, there is nonetheless an increase in concern around the usage of some farming practices. On four measures tested again this year, the biggest increase in concern registered was in the use of genetically modified foods (53% very or moderately concerned, up 8% since 2020). This was followed by the use of hormones in farming (55% very or moderately concerned, up 7% from 2020).

Exhibit A16 – FS7E, FS7G, FS7H & FS7I. How concerned, if at all, would you say you are about each of the following in Canada? % Very/Moderately concerned
Base: All respondents

| Column % | 2023 | 2020 |
|---|---|---|
| The use of hormones in farming | 55% | 48% |
| The use of antibiotics in farming | 49% | 45% |
| Genetically modified foods | 53% | 45% |
| The treatment of animals on farms | 47% | 42% |
| Sample size | 2011 | 2005 |

There are a few additional insights that can be teased out of this question. Hinting at the reasons for why they might adopt such dietary practices in the first place, the levels of concern surrounding the treatment of animals on farms is highest among those on reduced meat (62%) and plant-based (72%) diets. In line with the geographic distribution of those with these dietary preferences, urban areas express higher levels of concern (49%) over the treatment of animals on farms.

More broadly, there also appears to be a general trend in which those who say they are either very knowledgeable or not at all knowledgeable about Canada's agricultural and food sector are the most likely to say they are very concerned about a given subject. For example, when asked about concern surrounding genetically modified foods, over a third (36%) of both groups say they are very concerned – more than those with middling knowledge (30 to 31%). The same holds true with the use of hormones, the use of pesticides, and the use of antibiotics.

Complicating the picture, those who self-assess as being very knowledgeable about the sector are also the most likely to say they are not at all concerned – again often followed closely by those who say they are not at all knowledgeable. On the use of antibiotics in farming, for example, 16% of those who are very knowledgeable say they are not at all concerned while 11% who are not at all knowledgeable say the same. This compared with 5 to 7% who say the same with average levels of knowledge.

Even if respondents remain concerned about some farming practices, there appears to be a pragmatic recognition that some are a necessary part of food production. When asked whether they agree, for example, that the use of pesticides is a necessary part of food production, more respondents agree this year at 44% than when compared with 2020 (an increase of 12%).

This suggests that while respondents are generally concerned about the use of some practices, they generally trust Canadian farmers and producers in their employment of such practices. Moreover, a growing number understand the necessity of some of these practices, namely the use of pesticides, in meeting food production needs.

Exhibit A17 – FS6H. The use of pesticides (herbicides, fungicides, insecticides) is a necessary part of food production. - To what extent do you agree or disagree with each of the following statements?
Base: All respondents

| Column % | 2023 | 2020 |
|---|---|---|
| % Agree | 44% | 32% |
| Strongly agree | 9% | 5% |
| Agree | 35% | 26% |
| Neither agree nor disagree | 28% | 32% |
| Disagree | 15% | 21% |
| Strongly disagree | 5% | 9% |
| DK/NR | 8% | 6% |
| Sample size | 2011 | 2005 |

Further nuancing the conversation about trust in farmers versus concern over some farming practices, even if you isolate only those respondents who disagreed with the idea that farmers are responsible in their use of pesticides, it does not amount to an unequivocal rejection of the use of pesticides in food production. While half (50%) of this group also disagrees that pesticides must be part of the food production process, roughly a quarter (27%) remain neutral while nearly another one-in-five (19%) agree there is a role for pesticides.

## B. Impressions of Canadian food

Turning to respondents' impressions of food and beverages grown and produced in Canada. First off was a question about the quality of food and beverages produced in Canada, to which two thirds (66%) say it is good or excellent. Compared with 2020, however, the number who say it is excellent is down 16% whereas the number who now feel it is average is up 11%.

Exhibit B1 – QCF1. Generally speaking, what is your impression of the quality of the food and beverages produced/grown in Canada?
Base: All respondents

| Column % | 2023 | 2020 |
|---|---|---|
| % Excellent/Good quality | 66% | 83% |
| Excellent quality | 17% | 33% |
| Good quality | 49% | 50% |
| Average quality | 24% | 13% |
| Poor quality | 4% | 1% |
| Very poor quality | 2% | 0% |
| DK/NR | 4% | 3% |
| Sample size | 2011 | 2005 |

There are significant variations by generation. The older a respondents' generation is, the more likely they are to say that the quality of food and beverages produces and grown in Canada is good if not excellent quality. Baby Boomers are, for example, almost twice as likely to say that the quality of Canadian food and beverages are good or excellent than respondents in Generation Z (80% versus 42%).

Although Generation Z are the most likely to say that their impression of the quality of Canadian food and beverages is poor (11%) or very poor (5%), this still represents a minority. Instead, an important part of the difference between generations is accounted for by variations in the number of respondents selecting average quality.

Exhibit B2 – QCF1. Generally speaking, what is your impression of the quality of the food and beverages produced/grown in Canada?
Base: All respondents

| Column % | Total | Gen Z | Gen Y | Gen X | Baby Boomers |
|---|---|---|---|---|---|
| % Excellent/Good quality | 66% | 43% | 53% | 71% | 80% |
| Excellent quality | 17% | 6% | 11% | 19% | 24% |
| Good quality | 49% | 37% | 43% | 51% | 56% |
| Average quality | 24% | 36% | 32% | 21% | 16% |
| Poor quality | 4% | 11% | 6% | 3% | 1% |
| Very poor quality | 2% | 5% | 3% | 2% | 0% |
| DK/NR | 4% | 6% | 6% | 4% | 2% |
| Sample size | 2011 | 274 | 524 | 518 | 633 |

In addition to generational variation, there are geographic differences in the perceived quality of food in Canada. Those most likely to say that the quality of food and beverages produced and grown in Canada is either good or excellent are found in Saskatchewan and Manitoba (71%), Quebec (70%), and Atlantic Canada (70%). In Ontario, by contrast, only 62% of respondents say the same with over a quarter (28%) saying that the quality is only average.

On the availability of Canadian food options, with an 11% decline this year fewer respondents agree that there are enough options available for purchase (44% versus 55%) when compared with 2020.

Exhibit B3 – QCF2A. There are enough Canadian food options available for purchase - To what extent do you agree or disagree with each of the following statements?
Base: All respondents

| Column % | 2023 | 2020 |
|---|---|---|
| % Agree | 44% | 55% |
| Strongly agree | 8% | 13% |
| Agree | 35% | 42% |
| Neither agree nor disagree | 28% | 24% |
| Disagree | 20% | 16% |
| Strongly disagree | 3% | 2% |
| DK/NR | 5% | 3% |
| Sample size | 2011 | 2005 |

If it could be expected that the presence of enough Canadian food options may be more limited in rural areas, this does not seem to be borne out in the data. Instead, respondents in rural areas report almost the same levels of agreement with the idea that there are enough Canadian food options available for purchase as those in urban areas (41% versus 43%). Similarly, there are no significant differences by generation.

On the topic of if respondents are willing to pay more for food or beverages produced or grown in Canada, and perhaps driven by recent lived experiences of inflation, now only 36% of respondents say they are willing. This represents a 13% decline since 2020.

Exhibit B4 – QCF2B. When grocery shopping, I am willing to pay more for food and beverages that are produced/grown in Canada - To what extent do you agree or disagree with each of the following statements?
Base: All respondents

| Column % | 2023 | 2020 |
|---|---|---|
| % Agree | 36% | 49% |
| Strongly agree | 5% | 11% |
| Agree | 31% | 38% |
| Neither agree nor disagree | 32% | 29% |
| Disagree | 20% | 15% |
| Strongly disagree | 9% | 5% |
| DK/NR | 3% | 2% |
| Sample size | 2011 | 2005 |

Another question that may be influenced by recent inflationary trends and conversations surrounding the cost of living, half as many respondents this year say they agree Canadian grown and produced foods are affordable to buy (25% versus 49%).

Exhibit B5 – QCF2C. Canadian grown/produced foods are affordable to buy - To what extent do you agree or disagree with each of the following statements?
Base: All respondents

| Column % | 2023 | 2020 |
|---|---|---|
| % Agree | 25% | 49% |
| Strongly agree | 4% | 8% |
| Agree | 21% | 41% |
| Neither agree nor disagree | 36% | 32% |
| Disagree | 28% | 14% |
| Strongly disagree | 8% | 2% |
| DK/NR | 3% | 3% |
| Sample size | 2011 | 2005 |

When broken out by household income, it is notable that almost nobody in any income bracket strongly agrees that Canadian grown and produced foods are affordable (4 to 5%). It is also worth pointing out that even in higher income brackets ($60k to $100k and $100k or more annually), three-in-ten (28%) disagree that it is affordable. The lowest income bracket (under $60k annually) only diverges from the others in the rate of respondents who strongly disagree with the statement (12% compared with 7%).

In 2020, 63% of respondents indicated that they agreed Canadian grown and produced foods are better for the environment than imported foods, compared to 58% this year (a 5% decline).

Exhibit B6 – QCF2D. Canadian grown/produced foods are better for the environment than imported foods - To what extent do you agree or disagree with each of the following statements?
Base: All respondents

| Column % | 2023 | 2020 |
|---|---|---|
| % Agree | 58% | 63% |
| Strongly agree | 19% | 24% |
| Agree | 39% | 40% |
| Neither agree nor disagree | 26% | 25% |
| Disagree | 5% | 4% |
| Strongly disagree | 2% | 1% |
| DK/NR | 9% | 7% |
| Sample size | 2011 | 2005 |

Respondents born in Canada are more likely to strongly agree (21%) with the idea that Canadian grown or produced foods are better for the environment than those were born elsewhere (13%). Perhaps related to the distribution of newcomers to Canada in urban areas, respondents from rural areas are also the most likely to strongly agree about the more positive environmental impact of Canadian foods and beverages at one quarter (25%).

Up since 2020, half of respondents say they either sometimes (34% versus 31%) or rarely (16% versus 11%) look for food or beverages from Canada. Representing a decline since 2020, four-in-ten say they always (9% versus 14%) or often (32% versus 38%) do so.

Exhibit B7 – QCF3. How often do you look for food or beverages (including alcoholic beverages) produced/grown in Canada?

Base: All respondents

| Column % | 2023 | 2020 |
|---|---|---|
| % Always/Often | 40% | 51% |
| Always | 9% | 14% |
| Often | 32% | 38% |
| Sometimes | 34% | 31% |
| Rarely | 16% | 11% |
| Never | 6% | 5% |
| DK/NR | 3% | 2% |
| Sample size | 2011 | 2005 |

It could be expected that the regional variations in the perceived quality of food and beverages grown and produced in Canada would neatly map onto regional tendencies to seek out these products in stores. Although this is true of Quebec where almost half (47%) of respondents say they always or often look for food or beverages grown or produced in Canada, this does not hold for the other regions where Canadian products were well received with only 36% of those in Saskatchewan and Manitoba saying the same – the second lowest after British Columbia (34%). This suggests that there may be other variables such as cost that are interceding and causing a disconnect between the perceived quality of the product and shopping outcomes.

That being said, there is a general correlation between the perceived quality of food and beverages produced and grown in Canada and the tendency to look for these products in stores. Respondents who say that the quality of these products are excellent are by far the most likely to say they always or often look for them in stores (at 59%) whereas those who say they are very poor quality are the most likely to say they never do (at 26%).

This trend also helps explain differing generational shopping trends. Baby Boomers, who have the best perceptions of the quality of Canadian products and are the least price sensitive, are the most likely to say they always or often (54%) look for food grown or produced nationally. The inverse is true for respondents from Generation Z, who are the most likely to say that this is rarely (21%) or never (10%) a consideration.

Exhibit B8 – QCF3. How often do you look for food or beverages (including alcoholic beverages) produced/grown in Canada?
Base: All respondents

| Column % | Total | Gen Z | Gen Y | Gen X | Baby Boomers |
|---|---|---|---|---|---|
| % Always/Often | 40% | 21% | 31% | 39% | 54% |
| Always | 9% | 5% | 6% | 6% | 13% |
| Often | 32% | 15% | 25% | 33% | 41% |
| Sometimes | 34% | 41% | 37% | 35% | 29% |
| Rarely | 16% | 21% | 19% | 17% | 12% |
| Never | 6% | 10% | 8% | 7% | 4% |
| DK/NR | 3% | 7% | 4% | 2% | 1% |
| Sample size | 2011 | 274 | 524 | 518 | 633 |

After a 12% decline from 2020, fewer respondents this year say they always or often look for fresh produce grown in Canada (50% versus 62%). This trend is present across the other possibilities tested, with declines registered in those looking for packaged food and beverages

(31% versus 40%), fresh seafood (35% versus 41%), and fresh meat (51% versus 59%) grown or produced in Canada.

Respondents appear to be far more likely to look for fresh local products (for example, meat and produce) than those that are pre-packed or canned. The one exception to this at the level of the national topline is seafood. This is likely explained by regional variation, with the high rates of looking for fresh seafood in coastal regions (39% in British Columbia and 47% in Atlantic Canada) counterbalanced by lower rates in other areas.

Exhibit B9 – QCF7. When purchasing the following foods or beverages, how often do you look specifically for an option that is produced/grown in Canada? % Always/Often
Base: All respondents

| Column % | 2023 | 2020 |
|---|---|---|
| Fresh meat | 51% | 59% |
| Fresh produce | 50% | 62% |
| Fresh seafood | 35% | 41% |
| Packaged food and beverages | 31% | 40% |
| Alcoholic beverages | 28% | 37% |
| Sample size | 2011 | 2005 |

Baby Boomers are the most likely to say they always or often look for food or beverages from Canada across all the possibilities tested. This would appear to echo trends above in which older generations have more pride in Canadian products and feel that the quality is higher than younger generations.

While this relationship holds across all the responses tested, the greatest divide between older and younger generations is when looking at fresh products (for example, meat, produce, and seafood) and smallest when looking at pre-packaged goods (for example, packaged food, beverages, and alcohol), suggesting that the origin of the latter is less of a market distinguishing factor.

Exhibit B10 – QCF7. When purchasing the following foods or beverages, how often do you look specifically for an option that is produced/grown in Canada? % Always/Often
Base: All respondents

| Column % | Total | Gen Z | Gen Y | Gen X | Baby Boomers |
|---|---|---|---|---|---|
| Fresh meat | 51% | 37% | 42% | 53% | 61% |
| Fresh produce | 50% | 38% | 41% | 50% | 62% |
| Fresh seafood | 35% | 28% | 29% | 33% | 43% |
| Packaged food and beverages | 31% | 27% | 26% | 26% | 40% |
| Alcoholic beverages | 28% | 24% | 27% | 24% | 32% |
| Sample size | 2011 | 274 | 524 | 518 | 633 |

There is no meaningful change since 2020 in the proportion of respondents who believe it is either easy or difficult to determine whether a food or beverage item is Canadian in origin.

Exhibit B11 – QCF4. 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: Those who look for Canadian products

| Column % | 2023 | 2020 |
|---|---|---|
| % Easy | 58% | 60% |
| Very easy | 7% | 9% |
| Easy | 51% | 52% |
| Difficult | 31% | 31% |
| Very difficult | 4% | 3% |
| DK/NR | 7% | 6% |
| Sample size | 2011 | 2005 |

There is a correlation between a respondent's self-assessed knowledge of Canada's agriculture and food sector and the ease with which they are able to determine if a product is Canadian or not. The more knowledgeable someone is, the more likely they are to say that it is easier for them to discern a products Canadian origin. This holds true across the specific items tested below in Exhibit B13 as well.

Exhibit B12 – QCF4. 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?
FS2. Generally speaking, how knowledgeable do you feel you are about Canada's agriculture and food sector? % Very and somewhat knowledgeable & % Not very and not at all knowledgeable
Base: Those who look for Canadian products at least sometimes.

| Column % | Very and somewhat knowledgeable | Not very and not at all knowledgeable |
|---|---|---|
| % Easy | 62% | 53% |
| Very easy | 9% | 4% |
| Easy | 54% | 49% |
| Difficult | 30% | 33% |
| Very difficult | 4% | 4% |
| DK/NR | 3% | 10% |
| Sample size | 960 | 832 |

In this wave of the study, despite a drop of 8% from 2020, alcoholic beverages remain the easiest to identify if they are from Canada or not at 63%. This followed be fresh produce (56%), fresh meat (52%), and packaged food and beverages (50%) – all of which also declined since 2020.

When considering the proportion this year who say they never shop for fresh seafood, there is no meaningful difference in the proportion who say they feel it is easy to identify which are Canadian or from another country.

Exhibit B13 – QCF5. And when you are shopping for each of the following specific types of food and beverages, how easy or difficult do you feel it is to determine whether each of the following foods are Canadian or from another country? % Easy
Base: Those who look for Canadian products

| Column % | 2023 | 2020 |
|---|---|---|
| Fresh meat | 52% | 58% |
| Fresh produce | 56% | 64% |
| Fresh seafood | 38% | 41% |
| Packaged food and beverages | 50% | 54% |
| Alcoholic beverages | 63% | 71% |
| Sample size | 2011 | 2005 |

While the two primary means that respondents list for identifying whether food or beverages are from Canada remain reading the label and the signage on the display, the number who say they do each is down from 2020 by 4% each.

Exhibit B14 – QCF6. When you are trying to determine whether or not a food or beverage is from Canada, how do you identify the country of origin?
Base: All respondents

| Column % | 2023 | 2020 |
|---|---|---|
| % Any | 95% | 96% |
| Read the label | 83% | 87% |
| Signage at display | 42% | 46% |
| Talking to vendor/staff | 11% | 13% |
| Consult a vendor, restaurant, or product website | 9% | 8% |
| I buy directly from local farmers/growers | 14% | 17% |
| Other | 0% | 1% |
| DK/NR | 5% | 4% |
| Sample size | 2011 | 2005 |

## C. Views related to food policy

In this next section, respondents were asked about their views on a variety of questions about food policy. Consistent with the proportion in 2020, the majority of respondents believe that the best before and expiration dates mean different things to them (62% versus 61%), however, more than a third (34% versus 36%) say that the terms mean the same thing to them.

Exhibit C1 – FP1. Do the terms “best before date” and “expiration date” mean the same thing or different things to you?
Base: All respondents

| Column % | 2023 | 2020 |
|---|---|---|
| They mean the same thing to me | 34% | 36% |
| They mean different things to me | 62% | 61% |
| DK/NR | 4% | 3% |
| Sample size | 2011 | 2005 |

Of note, there are linguistic divides with those who speak English (69%) at home being far more likely to say that these two terms mean different things than those who speak French (41%). Those who speak other languages at home, but who took the survey in either English or French, responded in line with French-speaking respondents with half (51%) saying that the two terms mean the same thing to them.

On the topic of food waste, in an increase of 6% since 2020 one-quarter (25%) of respondents say they have little or no food waste in their household. Fewer respondents this year say that food waste in their household can be contributed to food rotting (47% versus 58%).

Exhibit C2 – FP2. What are the main causes of food waste in your household?
Base: All respondents

| Column % | 2023 | 2020 |
|---|---|---|
| % Any | 73% | 80% |
| Food has turned bad/moldy/rotten | 47% | 58% |
| Too much was prepared/left over | 34% | 36% |
| Past best-before date | 27% | - |
| Eating out | 10% | 12% |
| Ordering in | 7% | 0% |
| Poor planning | 1% | 0% |
| Other | 1% | 1% |
| Not applicable/Little to no food waste | 25% | 19% |
| DK/NR | 1% | 1% |
| Sample size | 2011 | 2005 |

There are variations in the causes ascribed to food waste depending on a respondents' region. Urbanites are, for example, more likely to say that food goes to waste due to eating out (13%) or ordering in (9%) than their suburban or rural counterparts – possibly due to limited options in these areas.

From a generational perspective, respondents that come from older generations are the most likely to say they have little to no food waste, with just over a third (35%) of Baby Boomers and a quarter (26%) of Generation X saying so.

Those in Generation Y are the most likely to say that food waste is the result of it going moldy (53%) – the top overall reason – whereas those in Generation Z are the most likely to say they prepare too much food or have too many leftovers (40%). Echoing points made above, these may be related to higher rates of eating out and ordering in among younger generations noted in the tables below.

Exhibit C3 – FP2. What are the main causes of food waste in your household?
Base: All respondents

| Column % | Total | Gen Z | Gen Y | Gen X | Baby Boomers |
|---|---|---|---|---|---|
| % Any | 73% | 83% | 82% | 73% | 65% |
| Food has turned bad/moldy/rotten | 47% | 49% | 53% | 48% | 42% |
| Too much was prepared/left over | 34% | 40% | 34% | 34% | 32% |
| Past best-before date | 27% | 34% | 31% | 29% | 21% |
| Eating out | 10% | 16% | 17% | 8% | 5% |
| Ordering in | 7% | 12% | 10% | 6% | 3% |
| Poor planning | 1% | 0% | 0% | 1% | 1% |
| Other | 1% | 0% | 1% | 2% | 1% |
| Not applicable/Little to no food waste | 25% | 14% | 16% | 26% | 35% |
| DK/NR | 1% | 3% | 2% | 1% | 0% |
| Sample size | 2011 | 274 | 524 | 518 | 633 |

Only one-in-ten respondents (9%) say they have not made any changes to reduce their food waste. Conversely, the most common changes made are eating home cooked meals more often (44%), making a grocery list (43%), and meal planning (41%).

Exhibit C4 – FP3. What, if any, changes have you made in order to help reduce the amount of food waste?
Base: All respondents

| Column % | Total | Gen Z | Gen Y | Gen X | Baby Boomers |
|---|---|---|---|---|---|
| Eating home cooked meals more often | 44% | 38% | 37% | 42% | 51% |
| Making a grocery list | 43% | 34% | 34% | 45% | 51% |
| Meal planning | 41% | 32% | 42% | 44% | 40% |
| Freezing, canning, drying or preserving fresh produce to extend its lifespan | 35% | 31% | 30% | 34% | 40% |
| Paying closer attention to best before dates | 34% | 35% | 30% | 32% | 37% |
| Buying smaller portion sizes | 33% | 27% | 33% | 28% | 40% |
| Composting food scraps | 30% | 24% | 27% | 27% | 36% |
| Creating a fridge or freezer inventory so I know which foods I have | 23% | 14% | 18% | 23% | 28% |
| Buying more packaged or frozen foods | 18% | 19% | 15% | 17% | 21% |
| Buying imperfect vegetables and fruits | 17% | 12% | 16% | 16% | 19% |
| Buying more “enjoy tonight” foods | 15% | 19% | 15% | 13% | 13% |
| Using a food waste reduction app to find discounted foods | 5% | 8% | 7% | 5% | 4% |
| Other | 1% | 1% | 1% | 1% | 0% |
| I have not made any changes to reduce the amount of food wasted in my household | 9% | 8% | 9% | 10% | 7% |
| Sample size | 2006 | 274 | 524 | 516 | 630 |

Among those who say they have made changes to reduce food waste, the majority (60%) have done so over economic concerns, while fewer say moral (23%) or environmental (13%) concerns were the main catalyst.

While respondents from each generation cite economic concerns as their top reason for trying to reduce their food waste, those in Generation X are the most likely to say that their main motivation are economic concerns (68%), whereas those in Generation Z are the most likely to cite environmental concerns (21%).

Exhibit C5 – FP4. What was your main motivation for trying to reduce the amount of food waste in your household?
Base: Those who made changes to reduce their household food waste

| Column % | Total | Gen Z | Gen Y | Gen X | Baby Boomers |
|---|---|---|---|---|---|
| Economic concerns (for example, the price of food) | 60% | 49% | 58% | 68% | 62% |
| Moral concerns (for example, others do not have enough to eat) | 23% | 26% | 26% | 20% | 23% |
| Environmental concerns | 13% | 21% | 14% | 11% | 11% |
| Other | 1% | 1% | 0% | 1% | 2% |
| DK/NR | 2% | 3% | 3% | 1% | 2% |
| Sample size | 1837 | 253 | 476 | 465 | 585 |

While economic concerns dominate across the country, respondents from Quebec stand out for being the most likely to select moral reasons for cutting back on food waste at three-in-ten (29%).

## D. Factors driving purchase decisions

Throughout this report, affordability has been touched on repeatedly and the data has clearly shown that concerns over the affordability of food are high and do relate to impressions of the sector. This section delves more deeply into the role price in food and beverage purchase decisions and explores its role as an explanatory factor. This section is not limited to price, however, and will also provide evidence on the role of other variables such as quality, taste, and nutritional value inter alia.

To this point, although the vast majority of respondents (72%) say that while price is usually an important factor in their purchasing decisions, there are also other important factors that they take into account. One fifth (20%) respondents from Generation Z are the most likely to say that price is the only factor that matters.

Exhibit D1 – CF1. Which of the following best describes the role price plays in your food and beverage purchase decisions?
Base: All respondents

| Column % | Total | Gen Z | Gen Y | Gen X | Baby Boomers |
|---|---|---|---|---|---|
| Price is usually the only factor that matters | 15% | 20% | 15% | 17% | 12% |
| Price is usually an important factor, but there are also other important factors | 72% | 71% | 73% | 74% | 71% |
| Price is usually a factor, but not as important as other factors | 10% | 8% | 10% | 9% | 12% |
| Price is not usually a factor | 2% | 1% | 1% | 1% | 4% |
| Sample size | 2011 | 274 | 524 | 518 | 633 |

Although the overall story is one in which price plays a very influential role in shaping purchasing decisions, there is also an interesting relationship with the amount of the household food shopping a respondent says they do and the importance of price in their decision making.

Respondents who say they do all of the grocery shopping are also the most likely to say that price is the only factor that matters (at 20%). Those who say they do almost all of the shopping are the most likely to say that price is one important factor among others (79%) while those who say they do half of it are the most likely to say that price is a factor but not as important as others.

Among those for whom price is not usually the only deciding variable, a majority say that quality (76%), taste (69%), and nutritional value (54%) are among the top factors that drive their food purchase decisions. Proximity is also an important consideration, with Canadian (33%) and locally (30%) produced and grown foods rounding out the top five for three-in-ten respondents.

Exhibit D2 – CF2. From the list below, please indicate up to 5 factors that usually influence your food and beverage purchase decisions?
Base: Those who mentioned multiple factors that impact their purchasing decisions

| Average | Total | Gen Z | Gen Y | Gen X | Baby Boomers |
|---|---|---|---|---|---|
| Quality | 76% | 71% | 71% | 77% | 79% |
| Taste | 69% | 73% | 71% | 72% | 65% |
| Nutritional value | 54% | 53% | 57% | 49% | 54% |
| Canadian produced/grown | 33% | 19% | 23% | 33% | 43% |
| Locally produced/grown within your province/territory | 30% | 17% | 21% | 28% | 40% |
| Raised without antibiotics | 17% | 9% | 15% | 19% | 19% |
| Raised without hormones | 16% | 12% | 14% | 20% | 17% |
| Sustainable packaging | 15% | 10% | 13% | 13% | 19% |
| Environmentally responsible | 14% | 20% | 14% | 11% | 14% |
| Non-GMO | 12% | 7% | 13% | 11% | 14% |
| Organic | 12% | 11% | 17% | 12% | 8% |
| Humanely produced | 9% | 9% | 7% | 7% | 12% |
| Fair trade | 7% | 3% | 6% | 5% | 9% |
| Plant-based | 5% | 6% | 7% | 4% | 4% |
| Vegan or vegetarian | 5% | 10% | 6% | 4% | 3% |
| Traceable from farm-to-fork | 4% | 3% | 4% | 3% | 4% |
| Low greenhouse gas emissions | 3% | 6% | 3% | 1% | 2% |
| Indigenous-owned business | 1% | 3% | 1% | 1% | 0% |
| Woman-owned business | 1% | 2% | 1% | 1% | 0% |
| Other | 5% | 6% | 4% | 6% | 4% |
| DK/NR | 1% | 2% | 1% | 2% | 1% |
| Sample size | 1,705 | 197 | 456 | 399 | 592 |

Among those for whom price is not usually the only factor, when given 100 points to allocate to their most important factors (up to 6) that drive purchasing decisions, the average respondent gives price (at 39) nearly twice as many points as any other factor. Rounding out the top five factors based on average point allocation are being vegan or vegetarian (21), taste (20), quality (19), and nutritional value (18).

In line with the tendency noted above, the younger a respondent's generation is, the more likely they are to place a higher value on price when compared with Baby Boomers. Perhaps reflective of a more stable financial situation, Baby Boomers and Generation X are the most likely to emphasize quality.

Exhibit D3 – CF3. If you had 100 points to allocate based on the level of importance you place on various factors pertaining to food and beverage purchasing decisions that you have identified, how would you allocate these points to each of them?
Base: Those who ranked factor in their top six

| Average | Total | Gen Z | Gen Y | Gen X | Baby Boomers |
|---|---|---|---|---|---|
| Price | 39 | 46 | 42 | 40 | 36 |
| Vegan or vegetarian | 21 | 21 | 26 | 18 | 16 |
| Taste | 20 | 20 | 20 | 20 | 21 |
| Quality | 19 | 18 | 18 | 20 | 21 |
| Nutritional value | 18 | 17 | 18 | 16 | 18 |
| Organic | 15 | 17 | 15 | 15 | 15 |
| Humanely produced | 13 | 11 | 11 | 14 | 14 |
| Plant-based | 13 | 10 | 13 | 14 | 13 |
| Indigenous-owned business | 13 | 9 | 16 | 22 | 8 |
| Environmentally responsible | 12 | 12 | 13 | 11 | 12 |
| Non-GMO | 11 | 7 | 12 | 12 | 12 |
| Canadian produced/grown | 11 | 9 | 10 | 11 | 11 |
| Raised without antibiotics | 11 | 7 | 9 | 12 | 11 |
| Locally produced/grown within your province/territory | 10 | 10 | 10 | 10 | 11 |
| Raised without hormones | 10 | 11 | 9 | 11 | 10 |
| Traceable from farm-to-fork | 9 | 5 | 9 | 11 | 10 |
| Sustainable packaging | 9 | 7 | 10 | 8 | 9 |
| Low greenhouse gas emissions | 9 | 7 | 10 | 9 | 9 |
| Woman-owned business | 9 | 6 | 14 | 2 | 10 |
| Fair trade | 8 | 7 | 10 | 8 | 7 |
| Other | 22 | 20 | 19 | 25 | 22 |

When asked of the whole sample, only 2% of respondents say they are not concerned about rising food prices. Conversely, seven-in-ten respondents say they are concerned about the rising price of fresh meat (70%) and produce (69%), and half are concerned about the rising cost of dairy (50%).

Exhibit D4 – CF4. When it comes to rising food prices, which food items, if any, are you most concerned about?
Base: All respondents

| Column % | Total | Gen Z | Gen Y | Gen X | Baby Boomers |
|---|---|---|---|---|---|
| Fresh meat | 70% | 60% | 68% | 74% | 73% |
| Fresh produce | 69% | 57% | 64% | 73% | 75% |
| Dairy products | 50% | 46% | 44% | 49% | 56% |
| Eggs | 24% | 32% | 28% | 20% | 21% |
| Pantry staples | 18% | 21% | 17% | 21% | 17% |
| Packaged foods or beverages | 18% | 23% | 19% | 16% | 18% |
| Fresh seafood | 15% | 14% | 16% | 11% | 15% |
| Alcoholic beverages | 5% | 9% | 7% | 6% | 3% |
| I am not concerned about rising food prices | 2% | 1% | 2% | 1% | 3% |
| Other | 1% | 1% | 1% | 1% | 1% |
| None of the above | 0% | 0% | 1% | 0% | 1% |
| DK/NR | 1% | 1% | 2% | 1% | 0% |

| | | | | | |
|---|---|---|---|---|---|
| Sample size | 2011 | 274 | 524 | 518 | 633 |

Perhaps reflective of geographic variations in dietary habits, those in rural areas are the most likely to be concerned about the price of fresh meat (77%) and pantry staples (24%) rising when compared to those in urban and suburban areas. Urbanites, for their part, are the most likely to be concerned about the rising cost of fresh seafood (18%). Similarly, those who follow reduced-meat, dairy-free, or plant-based diets report being the most concerned about the rising cost of fresh produce (77-80%).

When broken down by generation, those spending the most per month on food in their household are Generation X ($666) and Generation Y ($584). Compared to other generations, Generation X are also the least likely to say that their household spends $300 or less per month on food.

Exhibit D5 – DQ1. On average, about how much do you spend on food per month in your household?
Base: All respondents

| Column % | Total | Gen Z | Gen Y | Gen X | Baby Boomers |
|---|---|---|---|---|---|
| Average | $580 | $518 | $584 | $666 | $549 |
| $300 or Less | 22% | 29% | 22% | 16% | 22% |
| $301-$600 | 38% | 33% | 36% | 35% | 43% |
| Over $600 | 29% | 19% | 29% | 39% | 26% |
| DK/NR | 12% | 19% | 13% | 10% | 9% |
| Sample size | 2011 | 274 | 524 | 518 | 633 |

When looked at average spend by region in Canada, Albertans report spending the most at $595 a month whereas those in Atlantic Canada make do with $492 a month.

Part of the self-assessed differences in household food budgets can be explained by differences in household size. Two-in-five (42%) who say they are spending less than $300 a month on household food expenses, for example, report living by themselves. By comparison, only 4% of those who say they spend over $600 a month on food also report living alone.

Inversely, of those who say they spend over $600 a month on food in their household, two thirds (64%) say they live with at least two other people.

This helps explain why Baby Boomers spend less than Generation Y and Generation X on monthly household food budgets despite being the least likely to prioritize price when making purchasing decisions.

Exhibit D6 – DQ9. How many people are living or staying at your current address? (Include yourself and any other adults or children who are currently living or staying at this address for at least two months.)
Base: All respondents

| Column % | Total | Gen Z | Gen Y | Gen X | Baby Boomers |
|---|---|---|---|---|---|
| 1 | 21% | 16% | 17% | 17% | 28% |
| 2 | 38% | 23% | 30% | 30% | 53% |
| 3 | 17% | 22% | 22% | 21% | 11% |
| 4 | 14% | 23% | 19% | 20% | 5% |
| 5 or more | 8% | 15% | 11% | 11% | 3% |
| DK/NR | 1% | 1% | 1% | 0% | 0% |

Almost three-in-ten (29%) respondents claim to eat a special diet, including nearly one-in-ten who eat a reduced-meat diet (9%) or plant-based diet (7%). Dairy- and gluten-free diets are also cited by 6% of respondents.

Exhibit D7 – DQ2. Which, if any, of the following diets are you currently following?
Base: All respondents

| Column % | Total | Gen Z | Gen Y | Gen X | Baby Boomers |
|---|---|---|---|---|---|
| I do not currently follow any special diets | 70% | 57% | 64% | 75% | 74% |
| Any special diet | 29% | 41% | 34% | 24% | 25% |
| Reduced-meat diet | 9% | 11% | 11% | 6% | 8% |
| Plant-based diet | 7% | 11% | 10% | 6% | 5% |
| Gluten-free diet | 6% | 7% | 7% | 6% | 5% |
| Meat-based diet | 5% | 9% | 6% | 4% | 3% |
| Dairy-free diet | 6% | 11% | 7% | 6% | 4% |
| Halal | 4% | 11% | 6% | 3% | 1% |
| Other | 2% | 0% | 1% | 3% | 2% |
| DK/NR | 1% | 2% | 2% | 1% | 1% |
| Sample size | 2011 | 274 | 524 | 518 | 633 |

Among those who have a special diet, one-in-five do so to accommodate an intolerance or allergy (20%), or believe it is healthier (18%).

Exhibit D8 – DQ3. What is the primary reason you have for following one or more specific diets?
Base: Those who follow a special diet

| Column % | Total | Gen Z | Gen Y | Gen X | Baby Boomers |
|---|---|---|---|---|---|
| Due to a food intolerance/allergy | 20% | 21% | 14% | 27% | 21% |
| Believe this diet is healthier | 18% | 9% | 16% | 18% | 25% |
| Following advice from a health professional | 13% | 7% | 11% | 14% | 19% |
| Trying to lose weight | 12% | 9% | 14% | 12% | 11% |
| Due to a religious or cultural practice | 10% | 21% | 11% | 7% | 4% |
| Treatment of animals | 10% | 9% | 12% | 12% | 7% |
| Trying to reduce food costs | 8% | 12% | 9% | 7% | 5% |
| Trying to reduce environmental impact | 6% | 9% | 10% | 1% | 4% |
| Other | 1% | 0% | 2% | 1% | 1% |
| DK/NR | 3% | 2% | 2% | 3% | 3% |

| | | | | | |
|---|---|---|---|---|---|
| Sample size | 585 | 115 | 181 | 123 | 156 |

Among all the behaviours tested, those that speak to the intention to save money or reduce waste are the most common among respondents, including checking flyers (56%), trying to reduce their monthly grocery bill (56%) and being careful about buying or preparing food to reduce waste (47%).

Exhibit D9 – DQ4. From the list below, please check off any that apply to you.
Base: All respondents

| Column % | Total | Gen Z | Gen Y | Gen X | Baby Boomers |
|---|---|---|---|---|---|
| I check the flyers for the best prices before going grocery shopping. | 56% | 35% | 42% | 59% | 70% |
| I am trying to reduce my monthly grocery bill. | 56% | 48% | 57% | 61% | 55% |
| I am careful about how I buy and prepare food to minimize food waste. | 47% | 35% | 38% | 46% | 58% |
| I enjoy cooking. | 44% | 43% | 41% | 49% | 44% |
| I plan my meals ahead of time. | 37% | 28% | 36% | 39% | 40% |
| I regularly read the lists of ingredients of the food I buy. | 37% | 26% | 31% | 34% | 48% |
| I pay close attention to nutrient fact tables when shopping for food. | 29% | 24% | 28% | 28% | 32% |
| I am very health conscious and think carefully about what I eat. | 27% | 20% | 21% | 25% | 33% |
| I enjoy eating out and trying new restaurants. | 27% | 37% | 34% | 25% | 19% |
| I prefer to stay with the food that is made or comes from Canada. | 23% | 11% | 17% | 21% | 33% |
| I think about environmental sustainability when purchasing food. | 16% | 15% | 14% | 13% | 19% |
| I like to have the latest kitchen appliances for preparing my meals. | 10% | 11% | 9% | 11% | 10% |
| I am willing to pay extra for home delivery services because it makes my life easier. | 6% | 12% | 9% | 4% | 4% |
| Sample size | 2008 | 274 | 524 | 518 | 630 |

# Conclusions and recommendations

Canadians remain far more likely to have a positive than a negative impression of Canada's agriculture and food sector and continue to believe that the sector not only plays an important role in the present but want it to continue to grow and thrive in the future. There have been some notable changes in opinion in just the past few years, however. This study shows there has been a decline in the self-assessed level of knowledge Canadians have of the sector as well as a similar decline in the proportions holding decidedly favourable impressions.

Encouragingly, there has been no corresponding increase in negative impressions and the data continue to show a correlation between knowledge and impression – the more knowledgeable Canadians feel about the sector, the more they are inclined to hold favourable impressions. This also translates into trust for those working in the sector for being responsible in any number of important behaviours relating to food safety, quality, environmental stewardship, and treatment of animals. The less knowledgeable, the more they are inclined to reserve their judgement, offering neutral responses on most of these points.

This study highlights that there is strategic value in maintaining or advancing Canadians' level of knowledge of the sector and that the population can be broken down into discernible segments, each with different communications needs, opportunities, and challenges. It also showed that, while they may be vocal, the number of Canadians who feel both knowledgeable about and negative towards the sector, is a relatively small slice of society.

Additionally, this project demonstrates that the context within which Canadians think about the sector is one in which cost and affordability have become much more intense and broadly shared concerns. Canadians in all regions and demographic profiles are demonstrating concerns over price, but this study also serves to highlight that concern over affordability is even higher among equity-deserving segments of society. Those who identify as part of the 2SLGBTQI+ community or as living with a disability are even more likely than other Canadians to say they are feeling the pressures relating to price.

The need to place more consideration on home economics has not only caused increased concern, but it has also influenced the factors affecting purchase behaviour. Those with the greatest concern over price when purchasing food and beverages hold much less favourable opinions of food and beverage manufacturers and retailers, specifically. Their opinions towards farmers and ranchers are fairly positive and not terribly different from the rest of the population. This suggests that stresses being felt over price are impacting opinion relating to the sector, but these impacts are not applied equally across the sector.

Likely also relating to the changing home economics context, compared to 2020, fewer Canadians say they are willing to pay a premium for food and beverages produced in Canada. At the same time, Canadians are offering lower ratings on the quality of Canadian food, with some shift from describing it as good or even excellent towards describing it as average.In addition, the sense of the availability of Canadian food has also declined somewhat. On the change in perceptions of the availability of Canadian food, it is worth noting that there may also be a seasonal effect at play in this tracking metric. The 2020 study was completed in July and August, whereas this wave of study was undertaken in December, making for a very different array of Canadian food products that would be noticed, for produce in particular.

Going forward, the sector enjoys the continued support of Canadians who not only value the products, but also take pride in the sector itself. Compared to 2020, times certainly have changed in terms of the public's relationship with the sector, but there are many reasons to believe that dialogue between the sector and the public can be mutual beneficial.

# Appendix A: Quantitative methodology report

## Survey methodology

The overall approach adopted for this project was an online survey, the details of which are presented in the sections below.

## Questionnaire design

The questionnaire for this research was designed by Earnscliffe, in collaboration with AAFC, and provided for fielding to Leger. The survey was offered to shoppers in both English and French and completed based on their language preferences. Respondents could not skip any of the questions but were provided with the opportunity to decline to answer or to say they did not know.

## Sample design, selection, and weighting

The sampling plan for the research was designed by Earnscliffe in collaboration with AAFC. The research involved an online survey of 2,011 Canadians aged 18 and older, all of whom do at least some of their household's grocery shopping.

The online survey was conducted using Leger's proprietary online panel. Respondents quotas and weighting were used to ensure that the results are nationally representative by region, age, and gender according to the most recent Census data.

The following are the specific quotas for age, gender, and region set for this project:

Regional quotas and completions

| | | |
|---|---|---|
| Atlantic Canada | 134 | 134 |
| Quebec | 467 | 469 |
| Ontario | 769 | 770 |
| Manitoba/Saskatchewan | 136 | 136 |
| Alberta | 233 | 233 |
| British Columbia | 266 | 266 |

Gender quotas and completions

| | | |
|---|---|---|
| Female | 1034 | 1015 |
| Male | 976 | 975 |

Age quotas and completions

| | | |
|---|---|---|
| 18-24 | 227 | 227 |
| 25-34 | 330 | 323 |
| 35-44 | 325 | 322 |
| 45-54 | 360 | 363 |
| 55-64 | 351 | 351 |
| 65+ | 424 | 425 |

## Data collection

The online survey was conducted from December 8th to 14th, 2023, in English and in French. The survey was undertaken by Leger using their proprietary online panel.

## Nonresponse

Respondents 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.

Weighted and unweighted sample by region

| | | |
|---|---|---|
| Atlantic Canada | 7% | 7% |
| Quebec | 23% | 23% |
| Ontario | 38% | 39% |
| Manitoba & Saskatchewan | 7% | 6% |
| Alberta | 12% | 11% |
| British Columbia | 13% | 14% |

Weighted and unweighted sample by gender

| | | |
|---|---|---|
| Female | 50% | 51% |
| Male | 48% | 48% |
| Other | 1% | 1% |

Weighted and unweighted sample by age

| | | |
|---|---|---|

| | | |
|---|---|---|
| 18-34 | 27% | 27% |
| 35-54 | 34% | 32% |
| 55+ | 39% | 41% |

Weighted and unweighted sample by language

| | | |
|---|---|---|
| English | 72% | 72% |
| French | 23% | 22% |
| Other | 5% | 5% |

Weighted and unweighted sample by household income

| | | |
|---|---|---|
| Under $60,000 | 35% | 35% |
| $60,000 to just under $100,000 | 27% | 27% |
| $100,000 or more | 28% | 28% |

Weighted and unweighted sample by ethnic or cultural minority status

| | | |
|---|---|---|
| Racialized visible minority | 10% | 10% |
| Person with a disability | 10% | 9% |
| 2SLGBTQI+ | 6% | 6% |
| Ethno-cultural group | 5% | 5% |
| Indigenous person | 3% | 3% |
| None of the above | 68% | 69% |

## Quality controls

Prior to launching the survey, Earnscliffe tested the links to ensure programming matched the questionnaires. Leger conducted a pre-test of the surveys, and the data was reviewed by Earnscliffe prior to a full launch of the surveys. Upon completion of the pre-test, Earnscliffe reviewed the data to ensure all skip patterns were working and the questionnaire was easily understood by all respondents.

## Reporting

Results with upper-case sub-script in the tables presented under a separate cover indicate that the difference between the demographic groups analysed are significantly higher than results found in other columns in the table. In the text of the report, unless otherwise noted, demographic differences highlighted are statistically significant at the 95% confidence level. The statistical test used to determine the significance of the results was the Z-test. Due to rounding, results may not always add to 100%.

## Results

A total of 2,976 individuals entered the online survey, of which 2,011 qualified as eligible and completed the survey. The response rate for this survey was 6.71%.

Total entered survey: 2,976
Completed: 2,011
Not qualified/screen out: 103
Over quota: 179
Suspend/drop-off: 683

Unresolved (U): 27,941
Email invitation bounce-backs: 9
Email invitations unanswered: 27,932

In-scope non-responding (IS): 0
Qualified respondent break-off: 0

In-scope responding (R): 2,011
Completed surveys disqualified – quota filled: 0
Completed surveys disqualified – other reasons: 0
Completed surveys – valid: 2,011

Response rate = R/(U+IS+R): 6.71%

## Margin of error

Respondents for the online survey were selected from among those who have volunteered to participate/registered to participate in online surveys. The data have been weighted to reflect the demographic composition of the Canadian population aged 18 years or 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 for the entire sample. 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.

# Appendix B: Questionnaire

## Email invitation

Welcome and thank you for your interest in this study. Earnscliffe Strategies, 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 15 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.

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.
**[Insert url]**

## Landing page

Welcome and thank you for your interest in this study. Earnscliffe Strategies, 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.

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 questions

SQ1. Please indicate your age in years:____ [If less than 18 years, thank and terminate]

SQ2. Please indicate your gender identity.

- Man (1)
- Woman (2)
- Non-binary (3)
- Gender diverse (4)
- Two-Spirit (5)
- Intersex (6)
- Or please describe / self-identify in your own words:_____(7)
- Prefer not to say (99)

SQ3: How much of your household's grocery shopping do you, yourself, do?

- All of it (1)
- Almost all of it (2)
- About half of it (3)
- Less than half of it (4)
- None (5) [Thank and terminate]
- Prefer not to say (99) [Thank and terminate]

SQ4: In which province or territory do you live?

- 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 (99) [Thank and terminate]

## Factors driving purchase decisions

CF1. Which of the following best describes the role price plays in your food and beverage purchase decisions?

- Price is usually the only factor that matters (1)
- Price is usually an important factor, but there are also other important factors (2)
- Price is usually a factor, but not as important as other factors (3)
- Price is not usually a factor (4)
- Don't know/Prefer not to answer (99)

CF2. [ask if CF1 is greater than4] You have indicated that there are factors other than price that matter to you when making food and beverage purchases. From the list below, please indicate up to 5 factors that usually influence your food and beverage purchase decisions. If there are less than 5, you need not identify 5. If a factor that usually influences your purchase decisions is not listed or if there are more than 5, please select "Other" among your responses. [Randomize. Check box. Accept up to 5 responses.]

- Environmentally responsible (1)
- Organic (2)
- Humanely produced (3)
- Non-GMO (4)
- Plant-based
- Vegan or vegetarian (5)
- Nutritional value (7)
- Quality (8)
- Taste (9)
- Canadian produced/grown (10)
- Locally produced/grown within your province/territory (11)
- Sustainable packaging (for example, compostable, recyclable, reduced plastic) (12)
- Fair trade (13)
- Woman-owned business (14)
- Indigenous-owned business (15)
- Low greenhouse gas emissions (16)
- Traceable from farm-to-fork (18)
- Raised without antibiotics (19)
- Raised without hormones (20)
- Other (88) [Static]
- Don’t know/Prefer not to answer (99) [Exclusive] [static]

CF3. [Ask if CF2 is less than 4 and CF2 does not equal 99.] You have indicated that there are factors other than price that matter to you when making food and beverage purchases and identified at least one other factor. If you had 100 points to allocate based on the level of importance you place on various factors pertaining to food and beverage purchasing decisions that you have identified, how would you allocate these points to each of them? Please make sure the total adds up to 100. [Randomize. Display only price and the items selected in cf2. Accept up to six numerical answers that add to 100.]

- Price
- Environmentally responsible
- Organic
- Humanely produced
- Non-GMO
- Plant-based
- Vegan or vegetarian
- Nutritional value
- Quality
- Taste
- Canadian produced/grown
- Locally produced/grown within your province/territory
- Sustainable packaging (for example compostable, recyclable, reduced plastic))

- Fair trade
- Woman-owned business
- Indigenous-owned business
- Low greenhouse gas emissions
- Traceable from farm-to-fork
- Raised without antibiotics
- Raised without hormones
- Other
- Don’t know/Prefer not to answer (99) [Exclusive] [static]

CF4. When it comes to rising food prices, which food items, if any, are you most concerned about? [Randomize] [check box. Accept up to 3 responses.]

- Pantry staples (for example, yeast, sugar, flour, etcetera) (1)
- Dairy products (for example, cow’s milk, yoghurt, cheese, etcetera) (2)
- Packaged foods or beverages (for example, cereal, bakery, canned, frozen or bottled products) (3)
- Fresh produce (for example, fruits and vegetables) (4)
- Alcoholic beverages (for example, wine, beer, spirits, etcetera) (5)
- Fresh seafood (for example, fish, mussels, shrimp, etcetera) (6)
- Fresh meat (for example, poultry, beef, pork, etcetera) (7)
- Eggs (8)
- Other (88) [Static]
- None of the above (98) [Static]
- I am not concerned about rising food prices (0) [Static]
- Don’t know/Prefer not to answer (99) [Static]

## Food sector

FS1. Generally speaking, what is your overall impression of Canada’s agriculture and food sector?

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

FS2. Generally speaking, how knowledgeable do you feel you are about Canada’s agriculture and food sector?

- Very (1)

- Somewhat (2)
- Not very (3)
- Not at all (4)
- Don’t know/Prefer not to answer (99)

FS3. Canada’s agriculture and food sector includes farming/ranching, and food and beverage processing/manufacturing. How familiar would you say you are with each of the following? [Randomize]

| | Not at all familiar (4) | Not very familiar (3) | Somewhat familiar (2) | Very familiar (1) | Don’t know/Prefer not to answer (99) |
|---|---|---|---|---|---|
| a) Farming/ranching | | | | | |
| b) Food and beverage processing/manufacturing | | | | | |

FS4. Please rate your level of trust or distrust with each of the following. [Randomize]

| | Not at all trustworthy (4) | Not very trustworthy (3) | Moderately trustworthy (2) | Very trustworthy (1) | Don’t know/Prefer not to answer (99) |
|---|---|---|---|---|---|
| a) Farmers and ranchers | | | | | |
| b) Food and beverage manufacturers | | | | | |
| c) Food and beverage retailers (for example, grocery stores or big box stores that sell groceries.) | | | | | |

FS5. To what extent do you agree or disagree with each of the following statements? [Randomize]

| | Strongly disagree (5) | Disagree (4) | Neither agree nor disagree (3) | Agree (2) | Strongly agree (1) | Don't know/Prefer not to answer (99) |
|---|---|---|---|---|---|---|
| a) I trust that farmers are using antibiotics responsibly in the care of their animals. | | | | | | |
| b) I trust that farmers take the health and well-being of their animals seriously. | | | | | | |
| c) I trust that farmers are using pesticides (herbicides, fungicides, insecticides) responsibly. | | | | | | |
| d) I trust that farmers are using fertilizers responsibly. | | | | | | |

FS6. To what extent do you agree or disagree with each of the following statements? [Randomize]

| | Strongly disagree (5) | Disagree (4) | Neither agree nor disagree (3) | Agree (2) | Strongly agree (1) | Don't know/Prefer not to answer (99) |
|---|---|---|---|---|---|---|
| a) I am proud of the food and beverages that Canada produces. | | | | | | |
| b) Canada's farmers and ranchers are a source of pride for our country. | | | | | | |
| c) It is very important to ensure Canada's agricultural sector is successful and growing. | | | | | | |
| d) Canadian food and beverage retailers are | | | | | | |

| | | | | | | |
|---|---|---|---|---|---|---|
| making an effort to stabilize prices. | | | | | | |
| e) Canada's farmers are good stewards of the environment. | | | | | | |
| f) Canadian farming is environmentally responsible. | | | | | | |
| g) Canadian food and beverage manufacturers are environmentally responsible. | | | | | | |
| h) The use of pesticides (herbicides, fungicides, insecticides) is a necessary part of food production. | | | | | | |
| i) Certified organic grown/produced foods are better for the environment. | | | | | | |
| j) I trust that genetically modified (GM) foods do not pose any risks to my health. | | | | | | |

FS7. How concerned, if at all, would you say you are about each of the following in Canada? [Randomize]

| | Not at all concerned (5) | Slightly concerned (4) | Somewhat concerned (3) | Moderately concerned (2) | Very concerned (1) | Don't know/Prefer not to answer (99) |
|---|---|---|---|---|---|---|
| a) The impact of agricultural activities on the environment | | | | | | |
| b) The impact of plastic packaging of food on the | | | | | | |

| | | | | | | |
|---|---|---|---|---|---|---|
| environment. | | | | | | |
| c) The affordability of food in Canada. | | | | | | |
| d) The availability of healthy and nutritious food. | | | | | | |
| e) The use of hormones in farming. | | | | | | |
| f) The use of pesticides, herbicides and/or fungicides in farming. | | | | | | |
| g) The use of antibiotics in farming. | | | | | | |
| h) Genetically modified foods. | | | | | | |
| i) The treatment of animals on farms. | | | | | | |
| j) The amount of food wasted. | | | | | | |

## Canadian food

CF1. Generally speaking, what is your impression of the quality of the food and beverages produced/grown in Canada?

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

CF2. To what extent do you agree or disagree with each of the following statements? [Randomize]

| | Strongly disagree (5) | Disagree (4) | Neither agree nor disagree (3) | Agree (2) | Strongly agree (1) | Don't know/Prefer not to answer (99) |
|---|---|---|---|---|---|---|
| a) There are enough Canadian food options available for purchase. | | | | | | |
| b) When grocery shopping, I am willing to pay more for food and beverages that are produced/grown in Canada. | | | | | | |
| c) Canadian grown/produced foods are affordable to buy. | | | | | | |
| d) Canadian grown/produced foods are better for the environment than imported foods. | | | | | | |

CF3. How often do you look for food or beverages (including alcoholic beverages) produced/grown in Canada?

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

CF4. [If CF3 is greater than 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 easy (1)
- Easy (2)
- Difficult (3)
- Very difficult (4)
- Don't know/Prefer not to answer (99)

CF5. 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 (for example, fruits and vegetables)
b) Packaged food and beverages (for example, canned, frozen, bottled)
c) Alcoholic Beverages (for example, wine, beer, spirits)
d) Fresh seafood (for example, fish, mussels, shrimp)
e) Fresh meat (for example, poultry, beef, pork)

- Never shop for this type of food or beverage
- Very difficult
- Difficult
- Easy
- Very easy
- Don't know/Prefer not to answer

CF6. When you are trying to determine whether or not a food or beverage is from Canada, how do you identify the country of origin? [Randomize] [check box]

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

CF7. 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 (for example, fruits and vegetables)
b. Packaged food and beverages (for example, canned, frozen, bottled)
c. Alcoholic Beverages (for example, wine, beer, spirits, etcetera)
d. Fresh seafood (for example, fish, mussels, shrimp, etcetera)
e. Fresh meat (for example, poultry, beef, pork)

  - Never
  - Rarely
  - Sometimes
  - Often
  - Always
  - Never shop for this type of food or beverage

- Don't know/Prefer not to answer

## Food policy

FP1. 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)

FP2. What are the main causes of food waste in your household? [Randomize] [check box]

- Past best-before date (1)
- Food has turned bad/moldy/rotten (2)
- Too much was prepared/left over (3)
- Eating out (4)
- Ordering in (5)
- Other, please specify: (88) [Static]
- Not applicable/Little to no food waste (98) [Exclusive] [static]
- Don’t know/Prefer not to answer (99) [Exclusive] [static]

FP3. What, if any, changes have you made in order to help reduce the amount of food waste? [Randomize] [check box]

- Buying more packaged or frozen foods (for example, stays fresh longer) (1)
- Meal planning (2)
- Buying smaller portion sizes (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 best before dates (6)
- Using a food waste reduction app to find discounted foods (7)
- Buying imperfect vegetables and fruits (8)
- Buying more “enjoy tonight” foods (for example, discounted foods that are close to their best-before date) (9)
- Composting food scraps (10)
- Freezing, canning, drying or preserving fresh produce to extend its lifespan (111)
- Making a grocery list (12)
- Other, please specify: (88) [Static]
- I have not made any changes to reduce the amount of food wasted in my household (98) [Exclusive] [static]

FP4. [If FP3 is not equal to no changes] What was your main motivation for trying to reduce the amount of food waste in your household? [Randomize]

- Environmental concerns (1)
- Economic concerns (for example, the price of food) (2)
- Moral concerns (for example, others do not have enough to eat) (3)
- Other, please specify: (88) [Static]
- Don't know/Prefer not to answer (99) [Static]

## Demographics

DQ1. On average, about how much do you spend on food per month in your household?

- Amount: $____(77) [Range : $0 - $15,000]
- Don't know (99)

DQ2. Which, if any, of the following diets are you currently following? [Randomize] [checkbox]

- Plant-based diet (for example, vegetarian or vegan) (1)
- Reduced-meat diet (for example, pescatarian, flexitarian, Mediterranean) (2)
- Meat-based diet (for example, paleo, keto, carnivore) (3)
- Dairy-free diet (for example, do not consume animal dairy products such as milk, butter, etcetera) (4)
- Gluten-free diet (for example, do not consume foods containing gluten or wheat) (5)
- Halal (6)
- Kosher (7)
- Other, please specify:___ (88) [Static]
- I do not currently follow any special diets (97) [Exclusive] [skip to dq4] [static]
- Don't know/Prefer not to answer (99) [Exclusive] [skip to dq4] [static]

DQ3. What is the primary reason you have for following one or more specific diets? [Randomize]

- Trying to reduce food costs (1)
- Trying to reduce environmental impact (2)
- Believe this diet is healthier (3)
- Trying to lose weight (4)
- Due to a food intolerance/allergy (5)
- Treatment of animals (6)
- Following advice from a health professional (7)
- Due to a religious or cultural practice (8)
- Other, please specify:___ (88) [Static]

- Don’t know/Prefer not to answer (99) [Static]

DQ4. From the list below, please check off any that apply to you. [Randomize. Check box]

- I regularly read the lists of ingredients of the food I buy.
- I am very health conscious and think carefully about what I eat.
- I enjoy cooking.
- I prefer to stay with the food that is made or comes from Canada.
- I pay close attention to nutrient fact tables when shopping for food.
- I think about environmental sustainability when purchasing food.
- I am trying to reduce my monthly grocery bill.
- I enjoy eating out and trying new restaurants.
- I like to have the latest kitchen appliances for preparing my meals (for example, air fryer, pressure cooker, sous vide)
- I am willing to pay extra for home delivery services because it makes my life easier.
- I check the flyers for the best prices before going grocery shopping.
- I plan my meals ahead of time.
- I am careful about how I buy and prepare food to minimize food waste.

The last few questions are strictly for statistical purposes.

DQ5. How would you describe the area in which you live?

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

DQ6. What is the language you speak most often at home?

- English (1)
- French (2)
- Other, specify: (3)
- Prefer not to answer (99)

DQ7. [If SQ4 is not equal to 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)

DQ8. [If SQ4 equals 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)

DQ9. How many people are living or staying at your current address? (Include yourself and any other adults or children who are currently living or staying at this address for at least two months.)

- 1 [Skip to dq11]
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9
- 10
- 11
- 12+
- Prefer not to answer (99)

DQ10. Are there any children under 18 years old living or staying at your current address?

- Yes (1)
- No (2)
- Prefer not to answer (99)

DQ11. Were you born in Canada?

- Yes (1)
- No (2)
- Prefer not to answer (99)

DQ12. Do you identify as any of the following? [Checkbox]

- An Indigenous person, that is, First Nations, Inuk (Inuit), or Métis (1)
- A member of an ethno-cultural group (2)
- A member of a racialized visible minority group (3)
- A member of the 2SLGBTQI+ community (4)
- A person with a disability (5)

- None of the above (98) [Exclusive]
- Prefer not to answer (99) [Exclusive]

DQ13. [If DQ12 equals3] A person in a racialized minority group in Canada is someone (other than an Indigenous person as asked above) who is non-Caucasian in race or non-white in colour, regardless of place of birth. Are you a member of a racialized minority group? Which of the following best describes your minority group? Please select all that apply.

- Chinese (1)
- Black (2)
- Filipino (3)
- Arab (4)
- Latin, Central and South American origins (5)
- Southeast Asian (for example, Vietnamese, Cambodian, Laotian, Thai) (6)
- South Asian (for example, East Indian, Pakistani, Sri Lankan) (7)
- West Asian (for example, Iranian, Afghan) (8)
- Korean (9)
- Japanese (10)
- Another group, please specify (77):
- Prefer not to answer (99) [Exclusive]

DQ14. Which of the following categories best describes your total household income for 2022? 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)

This concludes the survey. Thank you for your participation!