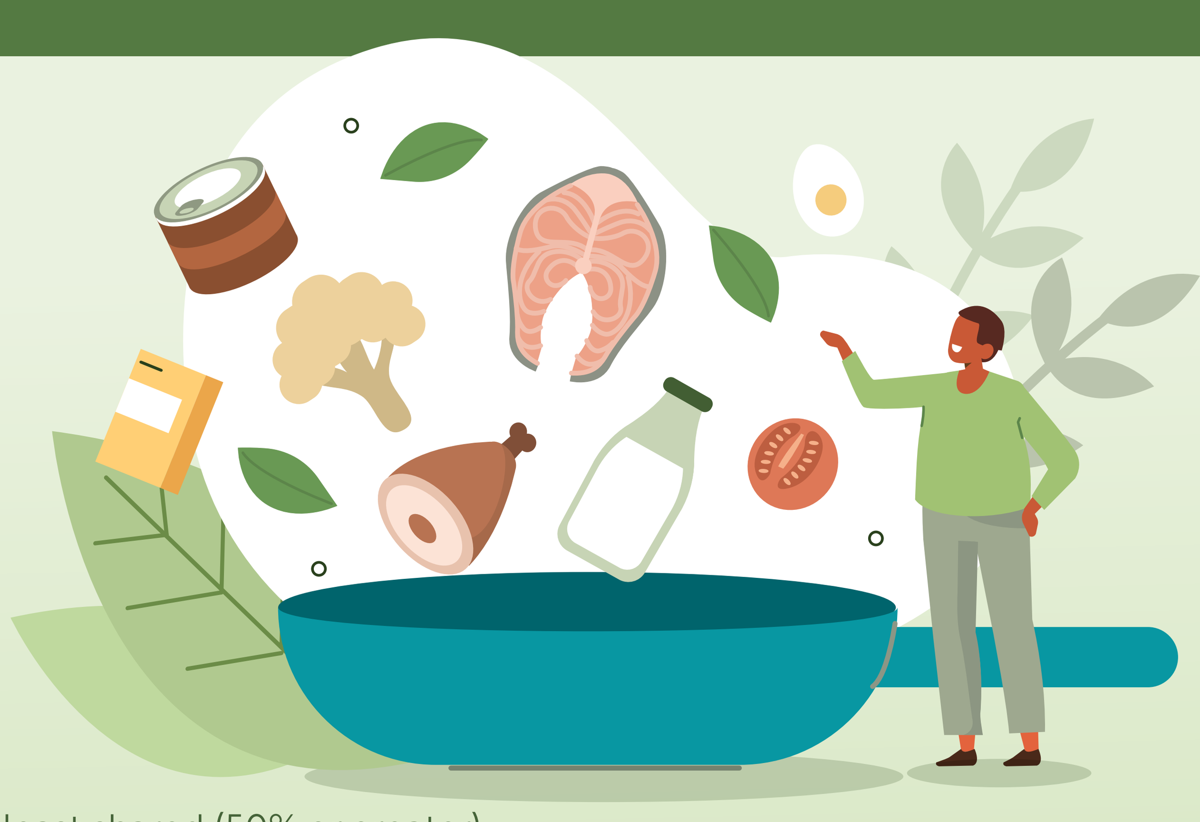
2023 Survey on Consumer Perceptions of Food



Wave VI • Methodology
March 16 to 28, 2023
3,343 Canadian adults (18+) who have at least shared (50% or greater) responsibility for grocery shopping for the household.

Compared to 2019, down facing arrows (↓) indicate a statistically significant lower result in 2023. Up facing arrows (↑) indicate a statistically higher result in 2023.

PUBLIC TRUST

88% of consumers say Canada's food and agriculture industry is moderately to very (26%) trustworthy

58% believe the Canadian agriculture and food industry is transparent about how food is produced

Elements considered VERY important

by Canadian consumers to building or maintaining the public's trust in food produced in Canada's agricultural and agri-food industry

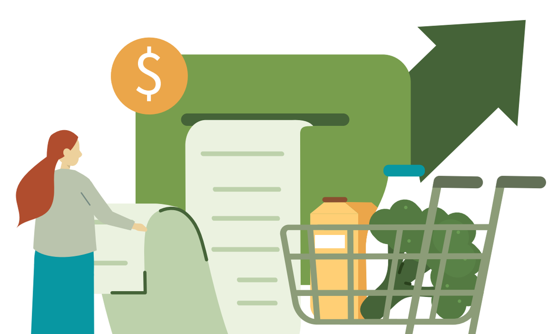
- **76% ↑4%** Affordability of food
- **74% ↓10%** Ensuring food safety
- **70% ↓12%** Accurate labeling

COST OF FOOD

70% of consumers say they have changed their food purchasing habits in the last year because of increasing food prices

of these

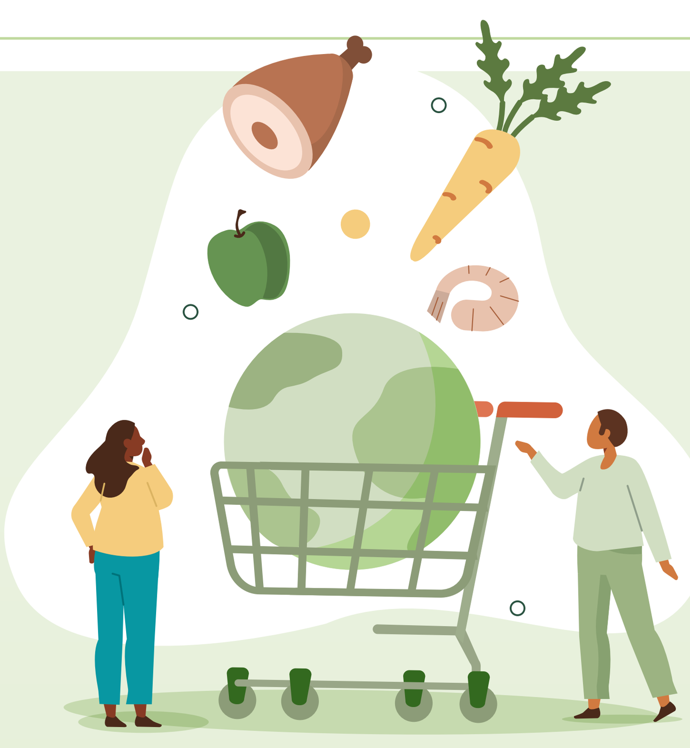
Purchasing **more discounted** or on sale food items	Purchasing **less expensive brands**	Shopping more often at **low-cost retailers**	Cutting **back on the amount** of food purchased
70%	66%	56%	50%



96% they sometimes to always (45%) seek foods that provide the best value for money spent

87% say the price of food affects their purchasing decisions

ENVIRONMENTAL SUSTAINABILITY



80% ↓3% say they are careful about the way they buy and prepare food to minimize food waste

60% ↓8% say they consider the environmental impact, such as reducing the use of plastic or packaging, in their food purchasing decisions

38% say they consider if a product has been produced using environmentally sensitive agricultural methods, such as water conservation, crop rotation, or zero/low till systems

1 in 5 (21%) **↓3%** report avoiding products with plastic packaging when making food purchase decisions

1 in 10 (11%) say they have changed their food purchasing habits in the last year due to impacts from climate change

PURCHASE DRIVERS

59% Canadian consumers define local as food produced within their region of the province (42%) to within their city or town (17%).

Organic

55% report seeking **organically produced food** at least sometimes

of those ↓

87% report purchasing these foods **at least sometimes**

of those ↓

93% use a label to determine if a product is **organic**

60% ↓4% say they would be willing to pay more for **organic** products

Local

86% ↓5% report seeking **locally produced food** at least sometimes

of those ↓

97% report purchasing these foods **at least sometimes**

of those ↓

87% use a label to determine if a product is **local**

50% ↓12% say they would be willing to pay more for **local products**

Environmentally sustainable

68% ↓3% report seeking **environmentally sustainable foods** at least sometimes

of those ↓

91% report purchasing these foods **at least sometimes**

of those ↓

75% use a label to determine if a product is **environmentally sustainable**

53% ↓10% say they would be willing to pay more for **environmentally sustainable products**

Humanely produced

67% report seeking **humanely produced food** products at least sometimes

of those ↓

88% report purchasing these foods **at least sometimes**

of those ↓

91% use a label to determine if a product is **humanely produced**

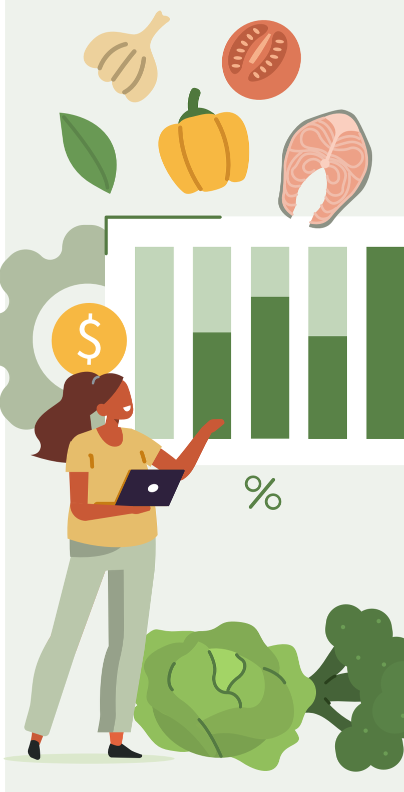
66% ↓11% say they would be willing to pay more for **humanely produced products**

PERCEIVED MOST IMPORTANT BENEFITS OF BUYING THESE FOODS

Organic
- **59%** Used **fewer pesticides** or chemicals to grow the product
- **47%** Product is **healthier**
- **40%** Product does not have **GMOs**
- **30% ↓19%** Product is **safer**

Local
- **74% ↓17%** Support the **local economy**
- **60% ↓7%** Product is **fresher**
- **32% ↓10%** Product has less of an **environmental impact**
- **21% ↑9%** Product is **healthier**

Environmentally sustainable
- **65% ↓18%** Product has less of an **environmental impact**
- **38% ↓4%** **Ethical or moral** benefits
- **32%** Product is **healthier**
- **29% ↑13%** Product is **fresher**



TOP REASONS PROVIDED FOR RARELY OR NEVER BUYING THESE FOODS

Organic
- **82% ↑9%** Too **expensive**
- **39% ↓4%** Don't see **the value**
- **37% ↓12%** **Not confident** in their organic production

Local
- **52% ↓12%** Too **expensive**
- **31%** **Not available** year round
- **23% ↓9%** **No discernible difference** from other products

Environmentally sustainable
- **51% ↑10%** Too **expensive**
- **32% ↓12%** **Not confident** in their sustainable production
- **22% ↓15%** **No discernible difference** from other products

Humanely produced
- **35% ↓8%** **Not confident** in their humane production
- **28% ↑7%** Too **expensive**
- **28% ↑23%** Lack of or **no labeling**