Consumer Perceptions of Food Safety and Quality
Wave 3 Tracking 2010

Prepared for: Agriculture and Agri-Food Canada

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TABLE OF CONTENTS

Contents

INTRODUCTION

Ipsos-Forward Research is very pleased to present the following report summarizing research conducted on behalf of Agriculture and Agri-Food Canada. This tracking study analyses Canadian consumer perceptions, attitudes and behaviour related to food safety, food attributes, buying habits, and understanding of assurance systems. These are core elements of the Growing Forward policy framework.

BACKGROUND

AAFC requires comprehensive research to monitor Canadian consumer attitudes and perceptions towards numerous issues related to the domestic agriculture and agri-food system, that can add detail to food safety and quality, and assurance system program and policy considerations under Growing Forward framework. To this end, a third wave of the Consumer Perceptions of Food Safety and Quality tracking was required.

Agriculture and Agri-Food Canada commissioned the first survey in 2004 to support the Agriculture Policy Framework (APF), the predecessor of Growing Forward. The survey was repeated in 2006/07 to obtain updated information on consumer confidence levels and consumer attitudes towards food safety and food quality issues relevant to the entire value chain.

The results of this work have been used to inform AAFC's market development, food safety, food quality and health policy work, as well as provide invaluable market intelligence to the Value Chain Bureau and Strategic Policy Branch. Data from the surveys have been published in the "Overview of the Agriculture and Agri-food System", AAFC's flagship publication about the structure and performance of the agriculture and agrifood sector, and in Growing Forward and FPT Working Group presentations and consultation documents. In the past, Health Canada, the Canadian Food Inspection Agency, the Agricultural Policy Research Networks, specifically, the Consumer and Market Demand Network, the Canadian Agri-food Policy Institute (CAPI), academia, provincial governments and the agri-food industry have all had access to the results and have been able to incorporate key findings into their own work.

The 2010, or Wave 3, edition of the survey provides further data points to measure confidence and attitudes over time, as well as providing the opportunity to investigate issues of emphasis highlighted in the Growing Forward agenda. The Assurance Systems Policy Division in Strategic Policy Branch of AAFC has requested the 2010 wave include an increased sample size and full, unblocked online portion of survey to allow for a richer data base and subsequent analysis -- while commissioned research be streamlined to focus on core issues related to consumer perceptions of food safety, food attributes and buying habits, and understanding of assurance systems.

Objectives

The following objectives were addressed in the 2010 Food Quality and Safety Tracking Study:

1. Refine existing 2006 survey questions to ensure departmental priorities are addressed in the 2010 survey.

2. Measure changes in consumer responses to the 2004 and 2006 questionnaires in the areas of:
   - perceptions of food safety, food attributes and assurance systems
   - confidence in Canadian food supply
   - buying habits
   - knowledge and awareness of assurance systems.

3. More fully investigate consumer attitudes and perceptions with respect to food safety and other food attributes and the use of assurance systems to underpin food attribute claims.
   - Degree of importance of food attributes in influencing buying decisions
   - Degree of importance of assurance systems in providing confidence to consumers that desired food attributes are being delivered, and influencing buying decisions
   - Beliefs, expectations, preferences of consumers regarding the operation of current assurance systems
   - Identify actions in the area of assurance systems that could increase / risk a loss of consumer confidence

i) understand the importance of attributes of interest in influencing buying decisions:
- method of production (e.g. organic, animal welfare)
- impact of production (e.g., sustainability, fair trade)
- origin (local, product of Canada)

ii) To what degree do consumers believe / expect / prefer "guarantees" (assurance system) that these attributes are being delivered as claimed? Do those expectations / demands vary by attribute?

Organization options: Government / agri-food industry / independent third-party / non-government advocacy group

a) What do consumers believe about the nature of assurance systems backing food attributes?

- Which organization do they believe makes the rules (standards) behind the claims?
- Which organization do they believe makes sure products actually deliver claims on the labels?

b) What are consumers' preferences about the nature of assurance systems backing food attributes?

- Which organization do consumers prefer makes the rules (standards) behind the claims?
- Which organization do they think should make sure products actually deliver claims on the labels

c) What terms constitute sufficient assurance / what provides more credibility:
Use of terms:

- Certified / certification
- Independent
- Third-party
- Government
- Specifies which organization made the rules
- Specifies which organization makes sure the rules are met

4.Examine all data by an extensive set of demographic and 'socio economic' variables.

Executive Summary

In Spring, 2004, Agriculture and Agri-Food Canada (AAFC) commissioned Ipsos-Reid to conduct a market research study to benchmark Canadian consumer perceptions, attitudes and behaviours related specifically to food safety and quality. AAFC elected to conduct a second wave of this study in the spring of 2006 to track significant changes among Canadian consumers. The 2010, or Wave 3, edition of the survey provides further data points to measure confidence and attitudes over time, as well as providing the opportunity to investigate issues of emphasis highlighted in the Growing Forward agenda. The Assurance Systems Policy Division in Strategic Policy Branch of AAFC requested the 2010 wave include an increased sample size and full, unblocked online portion of survey to allow for a richer data base and subsequent analysis -- while commissioned research be streamlined to focus on core issues related to consumer perceptions of food safety, food attributes and buying habits, and understanding of assurance systems.

The study addresses top-of-mind considerations when making food purchases in general and when buying food for the home or dining out. Perceptions of food quality and the level of confidence in the safety of food produced in Canada are both measured.

An online interview approach was used to collect feedback from 3144 main/joint consumers for the home throughout Canada.

The findings from this report will be used to help inform marketing strategies, support Growing Forward initiatives, and further research activities. The following summarizes these findings:

FOOD QUALITY

Canadians have a positive impression of the quality of food produced in Canada.

Nearly 90% of Canadians perceive the quality of food produced in Canada to be either excellent (30%) or good quality (59%). No respondent surveyed rated the quality of Canadian food any lower than average.

- Ontario residents are most likely to rate Canadian food quality as "excellent" (34%), while those in British Columbia are least likely to do so (23%).
- Those in Ontario (91%) and Quebec (91%) are most likely to rate the quality of food produced in Canadian food as either "good" or "excellent", British Columbians are least likely to (84%).

- Perceptions of the food quality are largely unaffected by age, gender and community type.

FOOD SAFETY

Despite recent challenges, there continues to be a high degree of confidence in the safety of Canadian food among Canadians.

Nearly all consumers are confident in the safety of Canadian food with 14% completely confident, 48% very confident and 35% somewhat confident. Only 4% indicate they are not very confident.

- By province, perceived safety of Canadian food is relatively equal, with the exception of Quebec, where perceptions of food safety are far lower than the national average (7% completey confident, 32% very confident versus the national average of 14% completely confident and 48% very confident).
- Although less severe than between provinces, perceptions of food safety tend to be most favourable among younger respondents and men.

Among the 86% of consumers not "completely" confident in the safety of Canadian food, there is no dominate reason why.

For nearly three in ten consumers, there is a perception that food products will never be 100% safe. Among the remainder, approximately 15% mention the 2008 listeriosis crisis, 13% mention bacterial contamination in general, and 12% mention a perceived high volume of food recalls as the only attributes mentioned by more than 10% of consumers.

By category, Canadians are most likely to be completely or very confident in bread/baked goods followed by fruit, vegetables and dairy products. Canadians are less likely to be confident in the food safety of store cut or pre-packaged deli meat.

Overall, consumer confidence in the safety of Canadian food has increased relative to five years ago.

Approximately one third (34%) of Canadians indicate their confidence in the safety of Canadian food has increased either a lot (11%) or a little (23%). Comparably fewer indicate their perceptions have either decreased a lot (4%) or a little (21%).

- By gender, men and women are approximately equally likely to indicate an increase in confidence of food safety, however, women (27%) are more likely than men (22%) to report a decrease in confidence relative to five years ago.
- Quebecers (48%) are far more likely than all other provinces (34% national average) to report improved perceptions of food safety relative to five years ago.

The media continues to be the predominate source of food safety information across all demographic and socio-economic segments.

Nearly one-in-five Canadians report that they were ill with foodborne illness during the past twelve months. Only 14% of those indicate it was from food prepared in their home.

PURCHASE FACTORS

Price is the most important criterion when making food purchase decisions both at home or in a restaurant.

Although price is the most frequently mentioned variable when making a food purchase choice, it is far more likely to be considered when making a purchase for at-home consumption (69%) than in dining out (47%). For both dining in (42%) and out (26%) "Quality" is the second most frequently mentioned variable. When dining out, attributes such as service (18% versus 1%) taste (17% versus 6%) and cleanliness of location (15% versus 4%) are more likely to be considered.

The majority of Canadian consumers indicate they always or often look for the best value for money spent, nutritional value, highest quality and brand reputation when making food purchase decisions at home. Although still the majority, significantly fewer look for "Product of Canada" or "Locally Produced" products.

- 85% or more consumers indicate they always or often consider best value for money spent, highest quality and/or brand reputation.
- 60% indicate they always or often consider "Product of Canada", 58% "Locally produced" and 50% "Convenience".
- Production related to attributes such as hormone/antibiotic free (30%), environmentally responsible production (31%), livestock feed related (27%), fair trade (26%), free range (22%) or organic (19%) are far less likely to be considered always or often.

When asked to define which factors are considered to be 'dealbreakers' – factors which must be present in all purchases, consumers 55 years or older were far more likely to list multiple factors.

LOCALLY PRODUCED

There is no universally established definition for locally produced foods. For four of the five definitions tested in this research, agreement for each ranged from as high as 37% of Canadians to as low as 18%.

Although "products grown or produced within a fixed distance of where they are sold" has the most broadly accepted definition (37%), other definitions were recognized by a significant proportion of Canadians.

- 23% - Products grown or produced within a specific province.
- 22% - Products grown or produced within a specific township or county.
- 18% - Products grown or produced within Canada.

Defining "locally produced" varies significantly by province.

- Ontario, British Columbia, Alberta and Saskatchewan are more likely to select "products grown or produced within a fixed distance of where they are sold."
- Quebecers are more likely to select products grown or produced within a specific township or county.
- Manitoba and Atlantic Canada are more likely to select products grown or produced within a specific province.

Of Canadians who seek out locally produced food items, the majority indicate they always (12%) or often (52%) search for this attribute while shopping or dining out.

Although, relatively few Canadians indicate they always (12%) seek out Canadian produced foods, the vast majority seek locally produced foods often (52%) or sometimes (32%). Very few (4%) consumers indicate they rarely seek out local foods.

Those who purchase local foods are most likely to do so to support the local economy, followed by a perception of being fresher.

While choosing local foods is a nearly universal behaviour among Canadians, only half agree they are willing to pay more for such foods. Conversely, about one-in-

five Canadians are unwilling to pay more for local; among those unwilling to pay more, most do not identify a tangible quality benefit to doing so.

ORGANIC

Relatively few Canadians indicate they seek organic foods on all shopping occasions. Findings suggest that most Canadians seek out organic foods "sometimes" or "rarely".

Although nearly half of Canadians purchase organic foods at least sometimes, relatively few do so always (4%) or often (14%). Health benefits, along with environmentally friendly production are the primary motivators for doing so, while costs along with a lack of perceived value are the primary barriers to purchasing organic foods.

At this time less than half (46%) of organic food shoppers have heard of the 'Canadian Organic' certification standard and only 3% indicate they "know a lot about it". Despite low familiarity, 44% of those aware of the standard indicate they always (12%) or often (33%) seek such organic products.

SPECIALTY FOOD CERTIFICATION

Half of Canadians believe foods "certified" to meet specific criteria are audited for compliance by a government agency, while one quarter indicate they do not know who is responsible for auditing such standards.

When asked to rate confidence in adherence to certification standards, for a variety of specific standards, two key findings are apparent.

- Nearly half of Canadians are unsure of standards relating to religious practices such as Kosher or Halal.
- When those who are uncertain are removed, confidence in specific standards tested is relatively equal with between 69% and 76% being very or somewhat confident in the adherence to Kosher, Halal, hormone/antibiotic free, fair trade and organic.

Across the range of food safety challenges tested the majority of Canadians are confident in the system's ability to manage animal diseases and bacterial contamination.

Slightly fewer than half of Canadians are very or somewhat confident in management of animal welfare (39%), food additives and preservatives (45%), hormone/antibiotics (41%) and/or environmental sustainability (42%).

Confidence is significantly weaker in the management of pesticide residues where only 37% are very or somewhat confident and 33% are not very or not at all confident.

The majority of Canadians believe the CFIA is responsible for regulations of food safety issues and/or hormone/antibiotic free foods. One half believes CFIA regulates organic food production.

When asked to select which agency is/should be responsible for regulation of a variety of food issues/standards CFIA was the organization most likely to be identified for all issues/standards except fair trade (which was most frequently associated with international government agencies). Respondents were most likely to associate CFIA with the following:

- Food safety
- Organic production
- Hormone /antibiotic free production
- Environmentally sustainable production

In each of the categories where CFIA is less frequently identified as being responsible, the incidence of "don't know" mentions increases significantly.

Respondents were asked to identify who they currently believe is responsible versus who they see being responsible for both setting policy and enforcement. In both cases CFIA continues to be the most frequently identified organization/entity, however, survey data suggests many Canadians would like to see greater involvement from independent experts and or advocacy groups.

FOOD AVOIDANCE/ BOYCOTT

More than one third of Canadians have avoided purchasing either a specific brand or type of food during the past twelve months.

Those in Ontario (42%) are most likely to have avoided a specific brand of food while those in British Columbia are most likely to have avoided a specific type of food (43%), restaurant/ dining establishment (38%) or grocery store/ retailer (26%). Canadians living in Atlantic Canada are significantly less likely to have avoided a restaurant/ dining establishment (26%) or grocery store/ retailer (12%).

When asked for the main reasons why, food safety concerns were the most dominant reasons for avoiding specific foods, while listeria/salmonella were the most frequent mentions for avoiding specific brands. Reasons for avoiding specific retail or dining locations are more strongly linked to quality, price and value.

The majority of Canadians indicate their confidence in a company is likely to be restored via government and/ or third party investigation. Public relations activities such as assurance statements and public apologies are also recognized by the majority of Canadians.

CLONING

The vast majority of Canadians believe the cloning of animals is unacceptable (55%). This belief is even more prevalent when put into the context of livestock animals (59%).

Generally, willingness to support cloning of animals is highest among men (23% support versus 9% among women) and those 18-34 years old by a slight margin.

METHODOLOGY

In the 2004 benchmark and 2006 tracking studies, a telephone interview approach was used. While this approach proved effective, it is acknowledged that more rigorous insight could be gained from using a new online approach. In order to balance the needs for further insight and analysis with the need to maintain consistent and reliable tracking of key measures over time, a mixed-methodology approach was used. It included a shortened telephone interview and an online survey.

- The telephone interview was approximately 12 minutes in length and focused exclusively on those key questions from the 2004 and 2006 studies that needed to be measured for tracking purposes. For the purposes of this tracking exercise, a sample size of 400 interviews was completed.
- The online questionnaire was conducted via Ipsos Reid's Online I-Say Panel. This sample source of more than 210,000 individuals represent a microcosm of the Canadian population. These individuals were pre-recruited to participate in research studies, so the turnaround time for data collection is significantly faster. From this group, more than 3000 individuals with main or joint grocery shopping responsibility for the household participated in a 20 minute online questionnaire. The online survey utilized an approach which allow for full sample to be analyzed for each question (no split monadic cells).
- Key questions from the CATI test wave and Online wave were compared to ensure that a movement to a new methodology would provide the same quality of data and similar results. Results from the online data is comparable to results from previous waves, with only a few discrepancies based on 'different' methodologies including the use of a five point scale instead of a four point scale to add a 'neutral' point and balance to the scale.

Before finalizing, both English and French questionnaires were tested for programming accuracy by the Ipsos programming team, and the project lead. The project was initiated with a "slow launch" which allowed for the first night's completes to be analyzed to ensure data were being recorded accurately.

Consistent with the 2004 and 2006 studies, a non-proportional sampling approach was used. For the online survey, this ensured that sufficient sample was allocated in each province for analysis at that level.

The total expenditure of this public opinion research is $95,163 (excluding GST)

Non-Proportional Sample Allocation								
	ATL	QC	ON	MB	SK	AB	BC	Canada
Population Dist'n	8%	26%	36%	4%	3%	9%	13%	
Telephone Survey								
Non-Prop'l Dist'n	13%	17%	19%	13%	13%	13%	14%	
Telephone Survey Sample = 400	50	70	75	50	50	50	55	400
Margin of error	±13.9%	±11.7%	±11.3%	±13.9%	±13.9%	±13.9%	±13.2%	±4.9%
Online Survey								
Non-Prop'l Dist'n	13%	17%	17%	13%	13%	13%	13%	
Online Survey Sample = 3144	434	520	536	409	410	415	420	3,144
Margin of error	±4.9%	±4.4%	±4.4%	±4.9%	±4.9%	±4.9%	±4.9%	±1.8%

Open-Ended versus Closed-Ended Questions
Two main question types were used in this study open-ended and closed-ended.

Closed-ended questions, where a definite response is sought from the respondent. Examples of these are yes/no type questions, questions where a scaled response (number scales or word scales) is sought and questions where response categories are set at the start of the interviewing process, such as demographics (e.g. age, household income, etc.).

The graphic presentation of these closed-ended questions is relatively simple. The response categories used are listed in the graph and the percentage of respondents providing each possible answer noted. Typically, these questions will not elicit more than a single answer, so the categories are mutually exclusive with all responses having a cumulative total of 100%. If multiple responses are accepted, the categories will have a cumulative total greater than 100%.

The second type of question is open-ended. These may have a pre-coded list of response categories where the response provided may fit what could be expected or they may be completely open, with responses being recorded verbatim. If a pre-coded list is provided, any response not fitting those codes/categories is recorded verbatim. All verbatim responses were then coded. That is, the research team reviewed the verbatim responses and assigned like responses to a single category. These categories are then reported, as with the closed-ended questions, with the percentage of respondents providing a specific category of response noted. Some open ended questions are asked to elicit a single or top-of-mind response. If this is the case, only the first thought provided by the respondent is captured. Others are meant to elicit multiple responses. In these, the respondent is probed to clarify their response and provide multiple answers.

NETs in Open-Ended Questions

When reviewing data from open-ended questions, several response categories may be collapsed into one overall category, called a "NET". For example, if a respondent is providing information regarding what they think is important about buying food for the home (Section 2.1 - Q1a), one respondent may say the nutritional value is most important while another says the fat content is the most important. While these are technically different responses, they are also part of the overall issue of nutrition, so both can be included in a "Nutrition (NET)" category.

When NET categories are reported graphically, points listed in all caps followed by the word NET are combined mentions. Specific items included in the NET are listed below that item, are preceded by a hyphen, and have a different colour scheme than the overall NET and response categories not included in a NET. Percentages of the items included in the NET are not cumulative, i.e., they may add to more than the percentage of the NET item due to a single respondent mentioning more than one item that was included in the overall NET and the NET would receive only one count. An example of this type of reporting can be found in Q1a/b, in the "2.1 Top-of-Mind Food Topics and Quality/Safety Trade-offs" Section of this report.

Reporting Statistically Significant Differences

Statistically significant differences are cited in many sections of this report. When a data table is included (see example below and the Detailed Tables Appendices), each column is appended with a letter. T-tests[1] are conducted on results, with an arrow, or coloured circle in a cell indicating significant differences between samples. The arrow directs the reader to note that the percentage reported in a specific cell is statistically different from the adjacent cell(s). In this report, the colour blue is used to indicate a number that is significantly higher than an adjacent piece of data, or red to signify it being significantly lower.

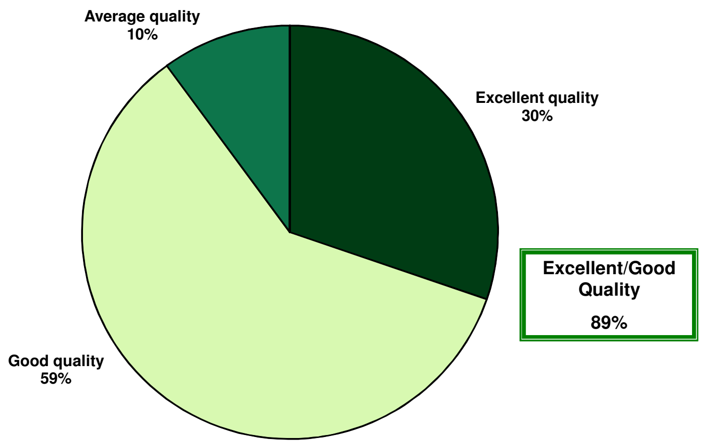
[1] T-Tests measure distances between the confidence intervals (at 95%) associated with sample data. Minimum sample sizes are required to perform such tests; no T-Test is conducted on samples of less than 30.

FOOD QUALITY SECTION

This section covers Canadians overall impression of food quality in Canada, analyzed at the aggregate level as well as by key demographic and socioeconomic subgroups.

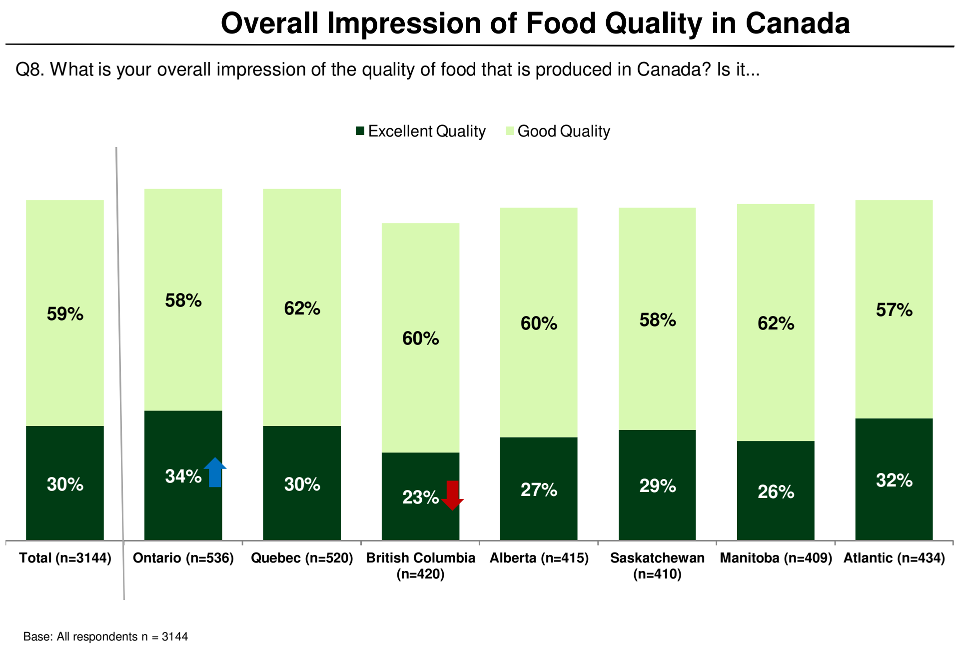
Overall Impression of Food Quality in Canada

Q8. What is your overall impression of the quality of food that is produced in Canada? Is it...

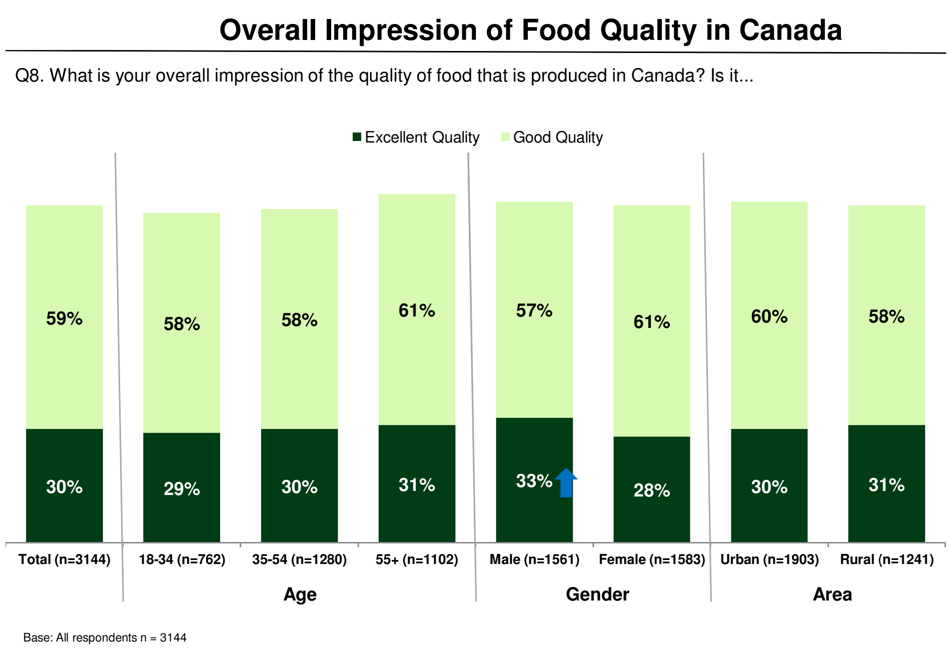


Base: All respondents n = 3144

Approximately three in ten Canadians feel that food produced in Canada is of excellent quality, and almost 90% of respondents feel that food produced in Canada is either good or excellent quality. Although approximately one in ten Canadians feel that food produced in Canada is of average quality, less than 1% of Canadians feel that food produced in Canada is below average.



Overall, there are very minor differences between provinces when looking at overall perceived impressions of food quality in Canada. The highest overall impressions are in seen in Ontario and Quebec with more than nine out of ten respondents perceiving food produced in Canada is either good or excellent quality. Although British Columbia has the lowest impressions, more than eight in ten respondents feel the quality is either excellent or good.



When comparing men and women's overall impressions of food quality in Canada, men are significantly more likely than women to believe that food produced in Canada is excellent quality, but when combining respondents who feel food quality is of excellent quality or good quality, the ratings are much more similar. Respondent age, income level or living in an urban or rural area does not influence overall impression towards food quality in Canada.

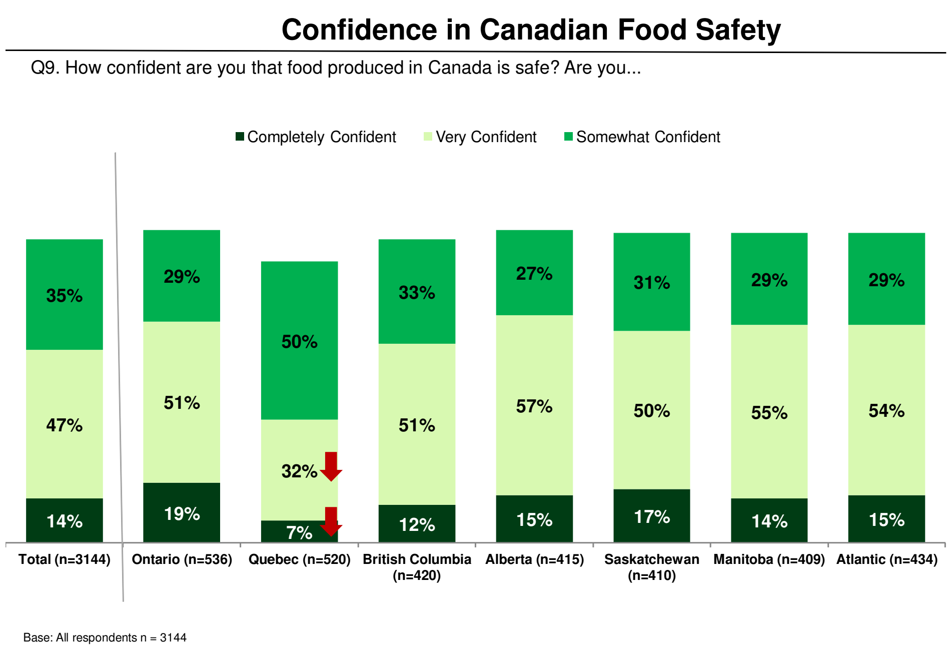
FOOD SAFETY SECTION

Topics covered in this section include consumer confidence in the safety of food produced in Canada, at the aggregate, provincial and socio-demographic levels as well as the reasons why respondents are not completely confident that food produced in Canada is safe.

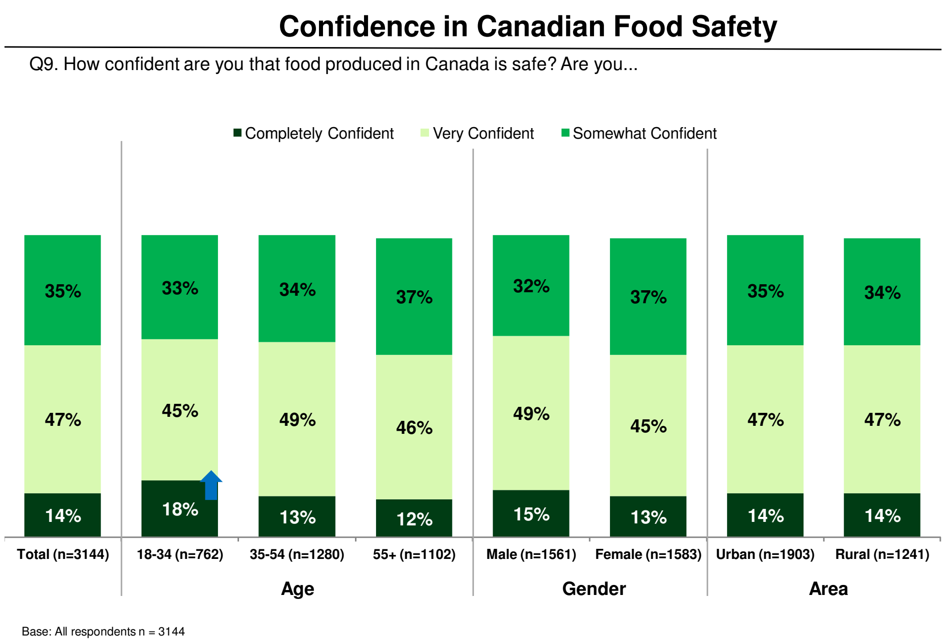
Current overall confidence in specific food categories is captured as well as overall confidence in food safety relative to five years ago. Also summarized are sources of information relating to food safety.

Perceived contraction of a food borne illnesses over the past twelve months and the perceived source of the illness is also included in this section of the report.

Approximately 96% of Canadians are at least somewhat confident in the safety of food produced in Canada. 14% of respondents are completely confident that food produced in Canada is safe and 47% are very confident; conversely, only 4% of Canadians state they are not very confident in Canadian food safety, while one more than one third of Canadians are somewhat confident that food produced in Canada is safe.



Respondents in Quebec rate their confidence in Canadian food safety significantly lower than all other provinces with only 7% of respondents in Quebec are completely confident in food safety, and 32% being very confident. British Columbians are also less confident in their perceived safety of foods produced in Canada than all other provinces besides Quebec. Ontario has the greatest percentage of respondents who are completely confident in the safety of Canadian produced food at approximately 20% while, Albertans and Ontarians have the highest percentage of respondents who are either completely or very confident in Canadian food safety. Although somewhat lower, respondents in Manitoba, Saskatchewan and the Maritimes also have comparable levels of confidence in Canadian food safety as Ontario and Alberta.

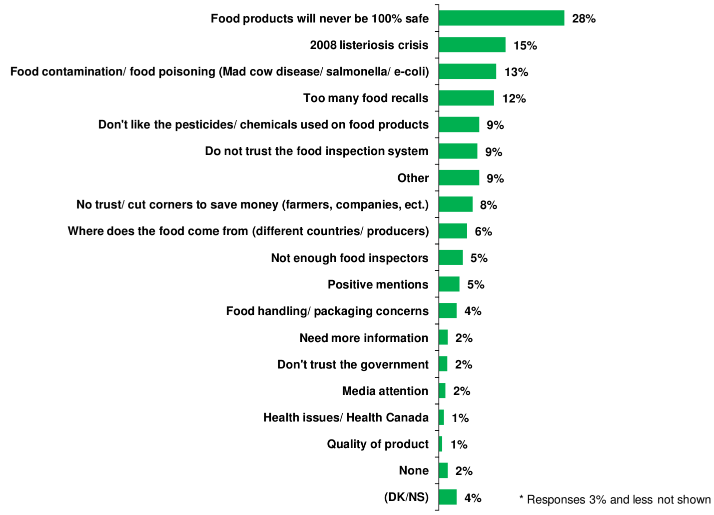


As age increases, overall confidence in food safety decreases gradually with 18% of those aged 18 to 34 being completely confident in Canadian food safety which is significantly higher than 13% of those aged 35 to 54 or 12% of respondents older than 55.

Although not shown, as income increases, so does overall confidence in food safety. 65% of respondents who have a combined household income greater than $100,000 are either completely or very confident in food safety of food produced in Canada as 67% of those who earn between $60,000 and $100,000, compared to 58% of respondents who earn less than $60,000 annually. Males are also slightly more likely to have higher confidence in the safety of food produced in Canada than their female counterparts. Living in an urban or rural area does not appear to influence overall confidence in Canadian food safety.

Reasons for Not Being Completely Confident that Food Produced in Canada is Safe (Open-Ended)

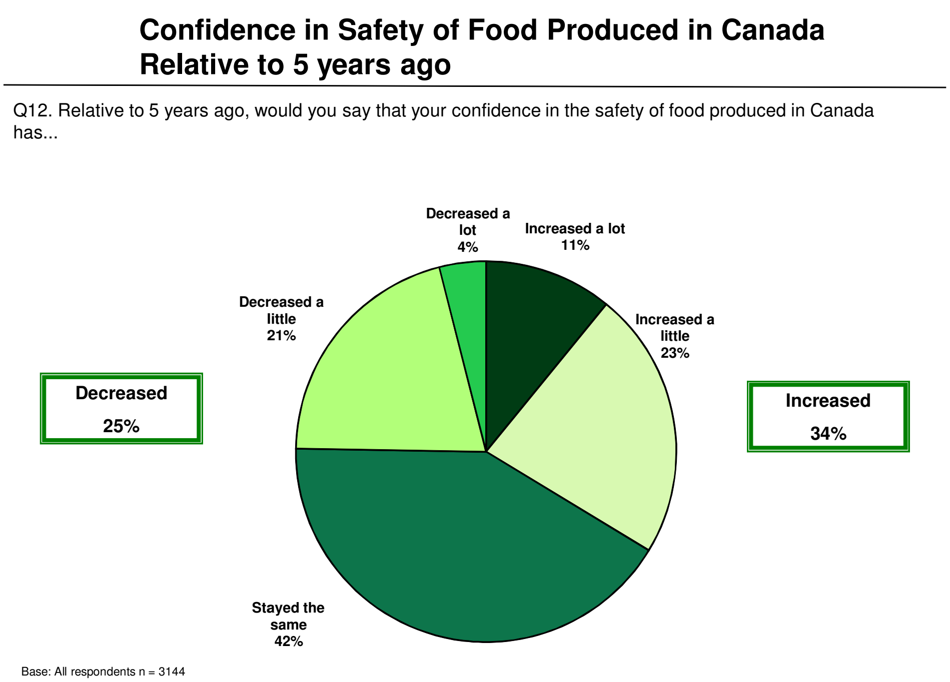
Q10. You indicated you are not completely confident that food produced in Canada is safe. What are the main reasons why?



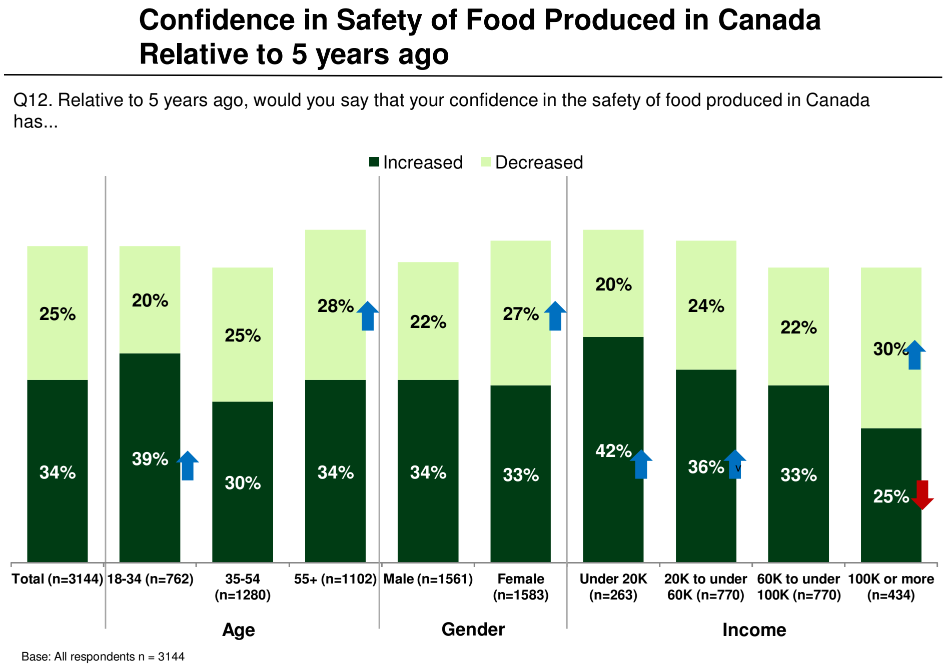
Base: Respondents not completely confident food produced in Canada is safe n = 2708

For those respondents who are not <u>completely</u> confident that food produced in Canada is safe approximately 30% of them responded that they believe food will never be 100% safe, while 15% of respondents mentioned the recent Maple Leaf listeriosis outbreak as the reason they are not completely confident in Canadian food safety. Some of the other more frequently mentioned factors include food contamination in general (13%) and too many food recalls (12%). Although there is some variance in mentions among demographic groups the noteworthy trends are apparent.

In general, Canadians have the highest confidence in the safety of bread and baked goods with 81% being completely or very confident in its safety, followed by fruits and vegetables (76%) and dairy products (74%). In-store cut meats and pre-packaged cut meats are ranked the lowest with 52% and 38% respectively. It is likely these categories are linked to the most prevalent reasons for not being completely confident in food safety such as recent meat recalls, listeriosis, and E. coli.



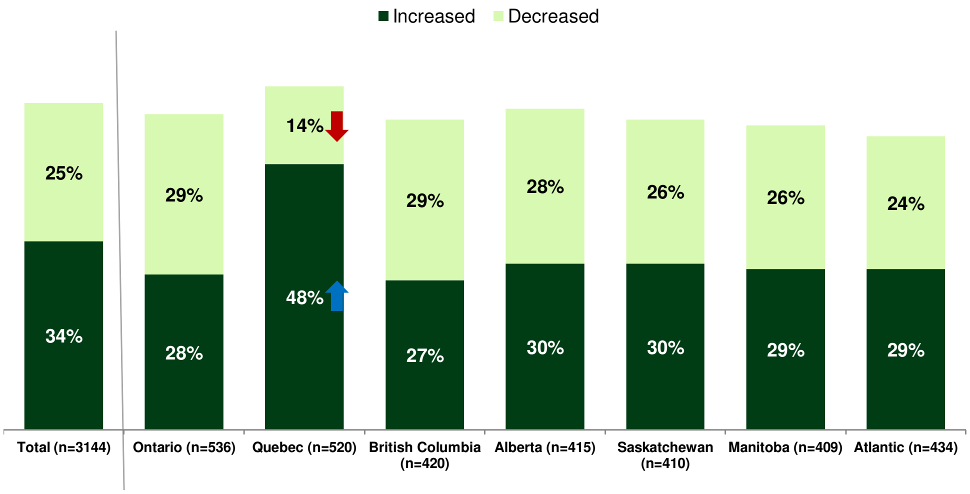
Almost half of Canadians state that their confidence in the safety of food produced in Canada has remained the same relative to five years ago. Approximately one third of respondent's state that their confidence has increased somewhat relative to five years ago, with one in ten respondents saying that their confidence has increased a lot. Of the quarter of respondents who feel their confidence in food safety has decreased relative to five years ago, only 4% say that their confidence has decrease a lot.



In nearly all demographic groups, the percentage of those whose perceptions of food safety has increased is greater than the percent where it has decreased. As income increases, propensity to indicate food safety perceptions have improved decline steadily from 42% among those in households earning less than $20,000 to 25% among respondents earning $100,000 or more per annum.

Confidence in Safety of Food Produced in Canada Relative to 5 years ago

Q12. Relative to 5 years ago, would you say that your confidence in the safety of food produced in Canada has...

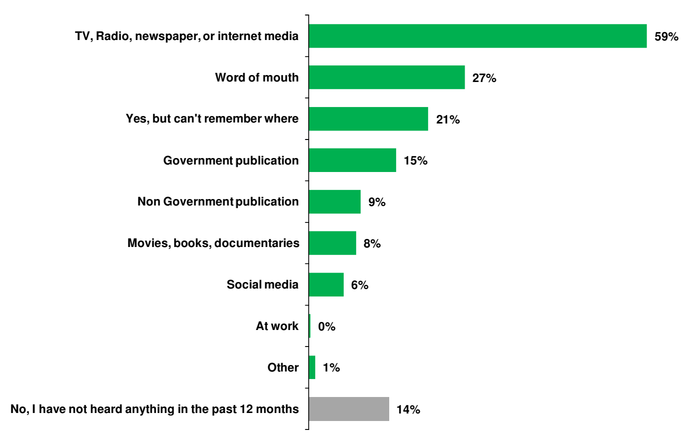


Base: All respondents n = 3144

With the exception of Quebec, stated change in confidence of food safety is relatively equal. In Quebec however, almost half of respondents state that their confidence in the safety of food produced in Canada has increased relative to five years ago. This increase is drastically greater than all other provinces. Quebec, also has the fewest respondents who say their confidence in Canadian food safety has decreased relative to five years ago, which is significantly lower than all other provinces.

Sources of Food Safety Information

Q15. In the past 12 months, have you read, seen or heard about food safety information from the following sources?

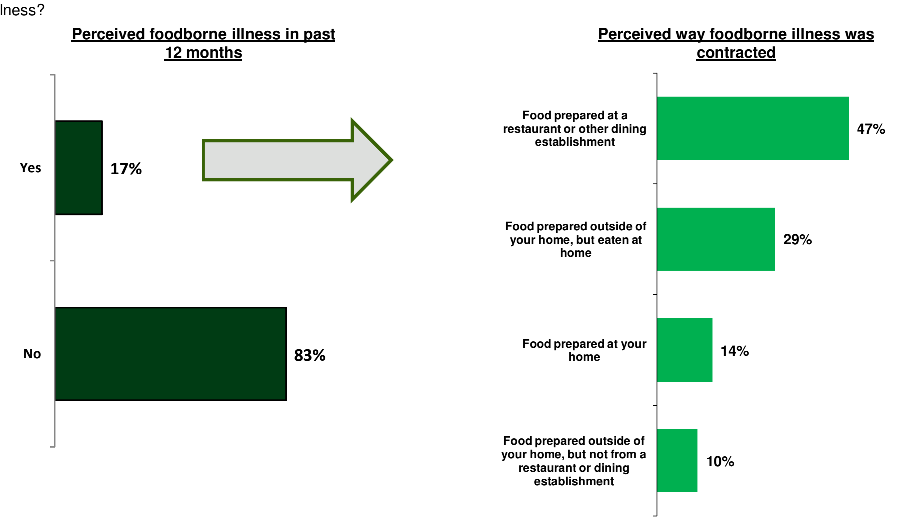


Base: All respondents n = 3144

When asked if they had read, seen or heard any information related to food safety during the past twelve months, almost 60% of respondents mention they have obtained some information relating to food safety from television, radio newspaper or internet media. The second most commonly mentioned source of information for food safety is word of mouth. Approximately one fifth of respondents who stated that they have seen, heard, or read something about food safety in the past twelve months, but were unsure where they heard it. 15% of respondents mention they have used government publications as their source of information for while 8% say they have seen some information on food safety in non government publications. At the other end of the spectrum, 14% of respondents were unable to recall hearing any information regarding food safety in the past 12 months. Interestingly, respondents from Quebec, those between the ages of 18 and 34, those with less than a high school diploma, or those who earn less than $60,000 annually were significantly more likely to state that they have not heard any information related to food safety in the past 12 months.

Foodborne Illness in Past 12 Months

Q13. And in the past year, have you experienced illness that you thought was due to the food you ate, that is a food borne illness?
Q14. Thinking about the last time you experienced foodborne illness, which of the following do you suspect was the source of the illness?



Base: All Respondents n = 3144

Base: Respondents who have had a food borne illness n =545

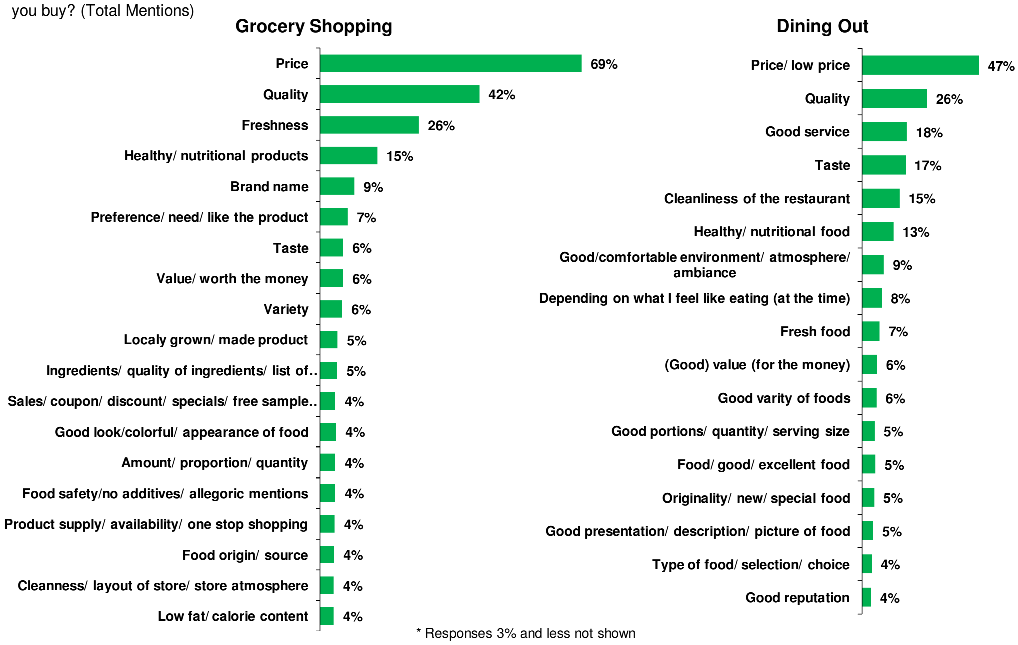
Approximately one in five indicate they have become ill with foodborne illness during the past twelve months. Incidence of illness is relatively equal across Canada with the exception of British Columbia where approximately one quarter of respondent's claim to have contracted a foodborne illness. Those aged 18-34 are also more likely to believe they have contracted a foodborne illness than respondents older than 35. Of those who believe they have experienced a foodborne illness in the past twelve months, almost half perceive that they contracted this illness from food prepared at a restaurant or dining establishment, more than one quarter believe they contracted it from food prepared outside the home but eaten at home, such as take-out meals or already prepared meals. To a much lesser extent, 14% of respondents believe they contracted this illness from food prepared in their home or food prepared outside their home but not at a restaurant (10%).

FOOD PURCHASING FACTORS SECTION

The following section includes the most important factors Canadians search for when grocery shopping and dining out, asked in both an unaided and aided fashion, as well as which factors or attributes respondents consider to be 'dealbreakers' when grocery shopping and dining out.

Most Important Factors when Grocery Shopping or Dining Out (Open-Ended)

Q1. When grocery shopping for food what is most important to you? That is, what are the most important factors that influence which products you buy? (Total Mentions)
Q2. When dining out or eating at a restaurant, what is most important to you? That is, what are the most important factors that influence which items you buy? (Total Mentions)



* Responses 3% and less not shown
Base: All respondents: n = 3144

When asked in open-ended form for the most important factors considered when respondent's grocery shop, 69% mentioned price, followed by quality (42%) freshness (26%), healthy or nutritional products (15%) and brand name (9%). Factors varied greatly after the five most commonly mentioned attributes, but many encompassed specific ingredients, sizes or preference, as well as appearance, availability and value for money. When asked the same question, but regarding dining out, many of the same factors were mentioned. Price (47%) is the most commonly stated factor, mentioned by almost half of Canadians followed by quality (26%), good service (18%), taste (17%) cleanliness of the restaurant (15%) and healthy or nutritional food (13%).

Most Important Factors when Grocery Shopping (Open-Ended)

Q1. When grocery shopping for food what is most important to you? That is, what are the most important factors that influence which products you buy? (Total Mentions)

	Ontario (n=536)	Quebec (n=520)	British Columbia (n=420)	Alberta (n=415)	Saskatchewan (n=410)	Manitoba (n=409)	Atlantic (n=434)
Price	71%	66%	67%	72%	68%	71%	73%
Quality	40%	48%↑	45%	43%	40%	37%	38%
Freshness	31%↑	22%	25%	25%	23%	23%	25%
Healthy/nutritional products	16%	9%	19%	20%	17%	19%	17%
Brand name	9%	9%	10%	9%	11%	14%↑	9%

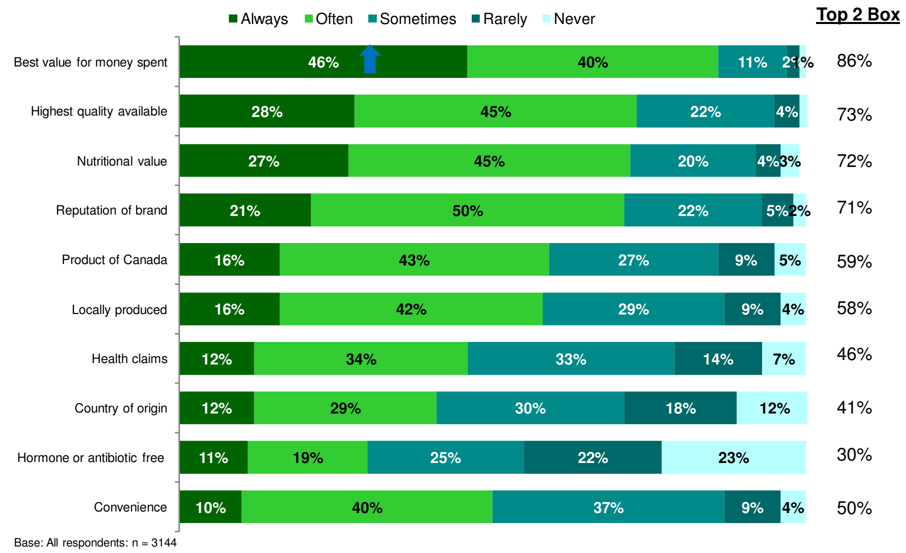
Base: All respondents: n = 3144

When comparing the most frequently mentioned factors considered when grocery shopping across provinces, Ontarians are significantly more likely to look for freshness than all other provinces, while respondents in Quebec are more quality oriented than the rest of the country. Significantly more people in Manitoba mentioned brand name to be an important factor when grocery shopping.

Although not shown, it is important to note that significantly less people in Quebec mention price as an important factor than any other province when dining out, otherwise no other differences are apparent across provinces or other demographics.

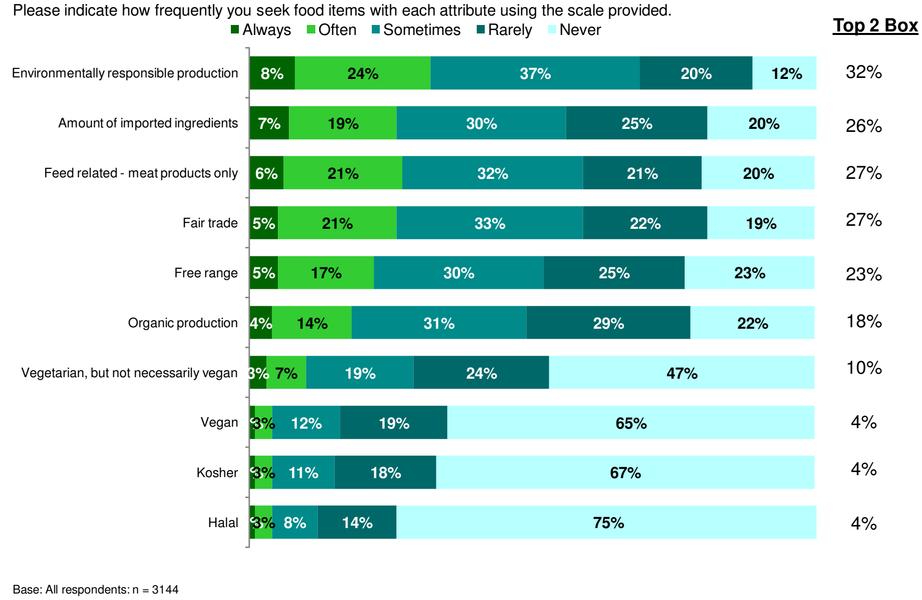
Attributes Searched for When Grocery Shopping/Dining Away from Home (1 of 2)

Q3. Listed below is a number of attributes which you may or may not look for when grocery shopping or dining away from home. Please indicate how frequently you seek food items with each attribute using the scale provided.



Attributes Searched for When Grocery Shopping/Dining Away from Home (2 of 2)

Q3. Listed below is a number of attributes which you may or may not look for when grocery shopping or dining away from home. Please indicate how frequently you seek food items with each attribute using the scale provided.

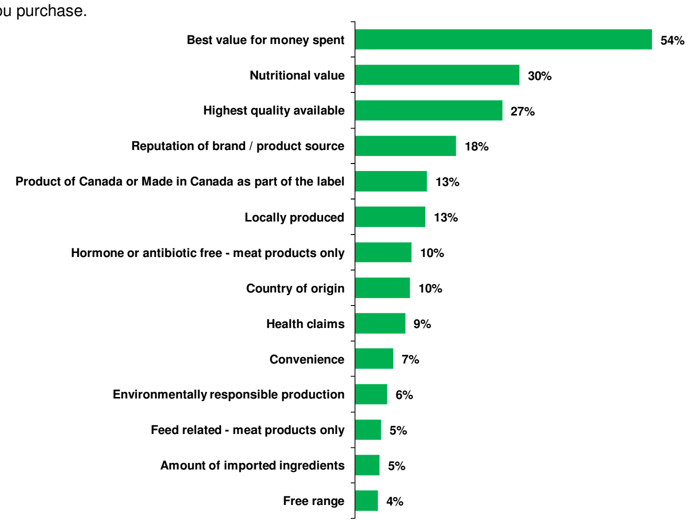


Almost half of respondents state they always search for the best value for money spent when grocery shopping or dining out. This is almost twenty percentage points higher than the next highest rated factor, highest quality available. By combining respondents who state that they always or often search for a factor it can be said that more than four out of five Canadians search for the best value, followed highest quality (73%) nutritional value (72%), and reputation of brand (71%). The frequency with which remaining factors are searched out decreases dramatically after the aforementioned attributes, 59% of respondents always or often look for product of Canada and 58% seek out locally produced items. Women are also statistically more likely to search for products with a nutritional value, product of Canada and locally produced products than males are.

Of all provinces, Quebec respondents are significantly more likely to seek highest quality available, while the rest of Canada is more likely than Quebec to seek out nutritional value. Support for locally produced/product of Canada is highest among residents in Ontario, Quebec and British Columbia. Propensity to choose vegan, vegetarian, organic, free range, and environmentally responsible products is highest in British Columbia.

Factors which are 'Dealbreakers'

Q4. Listed below are the features you indicated that you 'always' look for in food when grocery shopping or dining away from home. Please indicate which of those you consider to be 'deal breakers' or features which absolutely must be present in the food products you purchase.



* Responses 3% and less not shown

Base: Respondents who always/sometimes look for certain factors: n = 2200

A 'dealbreaker' is defined in this study as a factor which absolutely must be present when purchasing a food product. Respondents who stated they always, often or sometimes search for a given factor when grocery shopping or dining were then shown a follow up question asking which of these factors they consider to be deal breaking attributes. For more than half of respondents, value for money is a deal breaker, followed by three in ten who mention nutritional value and a slightly lower percentage that mention high quality being a deal breaking attribute. A product being of highest quality is significantly more important for residents of Quebec then elsewhere in the country. Approximately 20% of respondents state reputation of brand as a deal breaking attribute, with the remaining factors being selected by approximately one in ten respondents or less.

Factors that are 'Dealbreakers'

Q4. Listed below are the features you indicated that you 'always' look for in food when grocery shopping or dining away from home. Please indicate which of those you consider to be 'deal breakers' or features which absolutely must be present in the food products you purchase.

	18-34 years old (n=517)	35-54 years old (n=849)	55 years of age or older (n=834)
Best value for money spent	53%	58% ↑	50%
Nutritional value	26%	27%	35% ↑
Highest quality available	17% ↓	26%	38% ↑
Reputation of brand / product source	13%	17%	23% ↑
Product of Canada or Made in Canada as part of the label	6% ↓	11%	22% ↑
Locally produced	8%	10%	20% ↑
Hormone or antibiotic free - meat products only	8%	9%	15% ↑
Country of origin	6%	8%	15% ↑
Health claims	9%	7%	13% ↑

Base: Respondents who always/sometimes look for certain factors: n = 2200

When looking at 'dealbreakers' attributes across demographics it can be seen that consumers over the age of 55 are more likely to have a longer list of deal breaking attributes. Nine of the attributes were rated as deal breaking attributes by more than 10% of respondents over the age of 55, compared to 6 attributes for those between the age of 35 and 54 and 4 attributes by those under the age of 34. Respondents between the ages of 35 and 54 are most likely to list best value for money as a deal breaking attribute compared to respondents both younger and older.

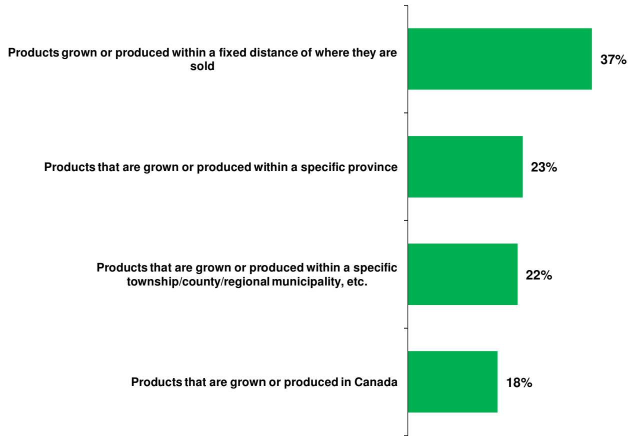
LOCALLY PRODUCED SECTION

The following section focuses on consumer attitudes and behaviour relating to locally produced foods, specifically, how Canadians define the term 'locally produced', their likelihood to seek locally produced products, reasons for buying locally produced products as well as propensity to pay a premium for these products.

Reasons for not purchasing locally produced products are also captured from respondents who state they rarely or never seek this attribute.

Definition of "Locally Produced"

Q6D. In your opinion, which definition below best describes 'locally produced food'?

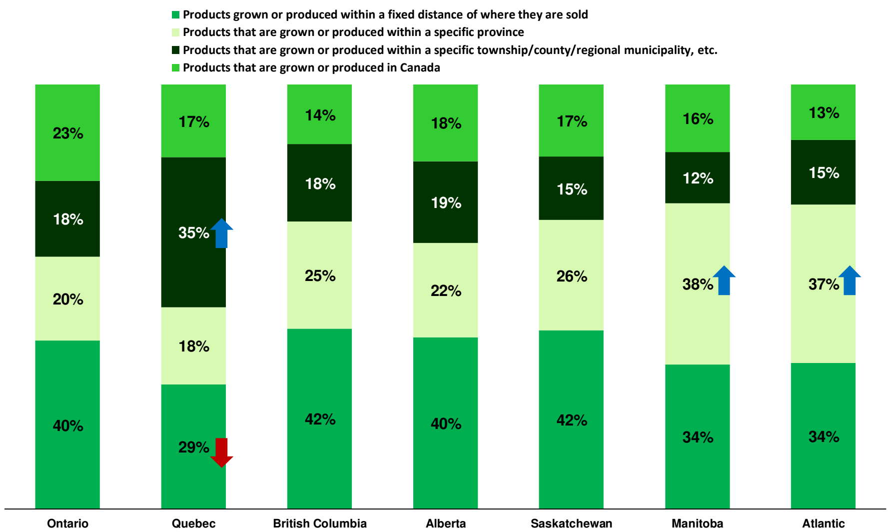


Base: All respondents n = 3144

Respondents were shown a list of definitions that could be used to describe the term 'locally produced' and asked to select the one which they thought best described their opinion. Almost 40% of Canadians feel 'locally produced' is a product grown or produced within a fixed distance of where they are sold, while about one quarter of respondents believe that it is a product grown or produced within a specific province, slightly less consider 'locally produced' to be either a product that is grown or produced within a specific township, county or regional municipality or that it is any product grown in Canada. This same finding does not differ across demographic or socio economic segments.

Definition of "Locally Produced"

Q6D. In your opinion, which definition below best describes 'locally produced food'?

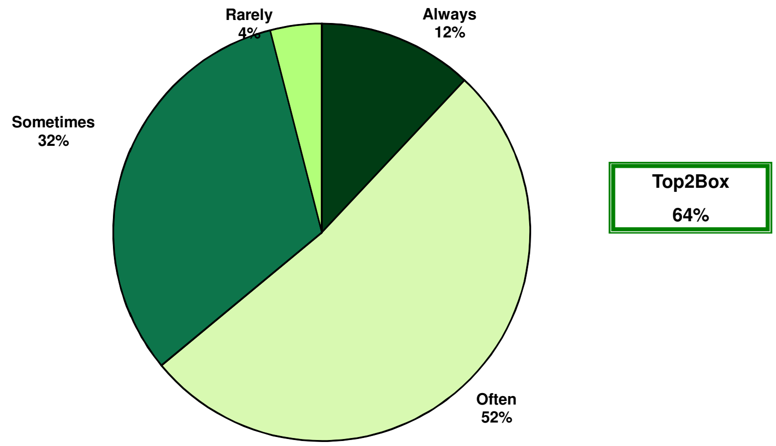


Base: All respondents n = 3144

Respondents from Quebec are much less likely to define locally produced as a product grown or produced within a fixed distance of where they are sold than all other provinces, but are significantly more likely to define it as a product grown or produced in a specific township, county or regional municipality. Respondents in both Manitoba and the Atlantic provinces are significantly more likely than all other provinces to define 'locally produced' as a product that is grown or produced within a specific province.

Likelihood to Seek Locally Produced Products

Q6B. Thinking of when you go grocery shopping, please indicate how frequently you seek out locally produced food items?

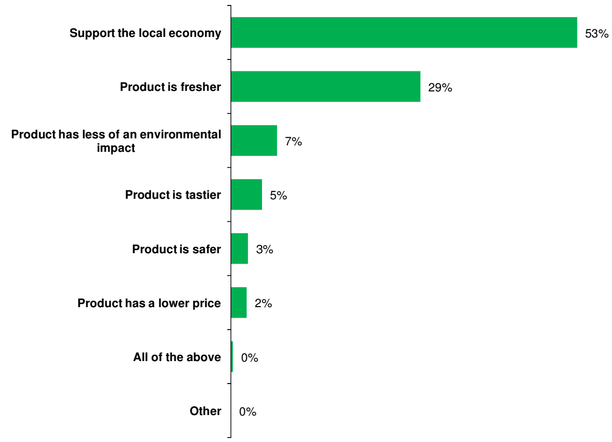


Base: Always/Often/Sometimes look for locally produced products n = 2686

Although only approximately 10% of respondents who purchase locally produced products claim they always search for them when grocery shopping, 64% of respondents say that they always or often seek out locally produced items. Conversely, only 4% of respondents claim they rarely look for such foods. This trend is common across all provinces except for Saskatchewan and Alberta, where only 43% and 46% of respondents claim that they always or often search for locally produced products. In Ontario, respondents are most likely to state they always search for locally produced products (16%) as compared to all other provinces but when combining those who say they always or often seek out locally produced products the variance is minor between all provinces expect in. As age increases, respondents are significantly more likely to seek locally produced products, while only slight differences exist among income levels, gender, education and living in an urban or rural area in terms of the frequency in which respondents seek out locally produced products.

Reasons for Buying Locally Produced Products (Open-Ended)

Q6A. You mentioned that you sometimes, often or always purchase locally produced foods when grocery shopping. In your opinion what is the most important benefit of locally produced foods?

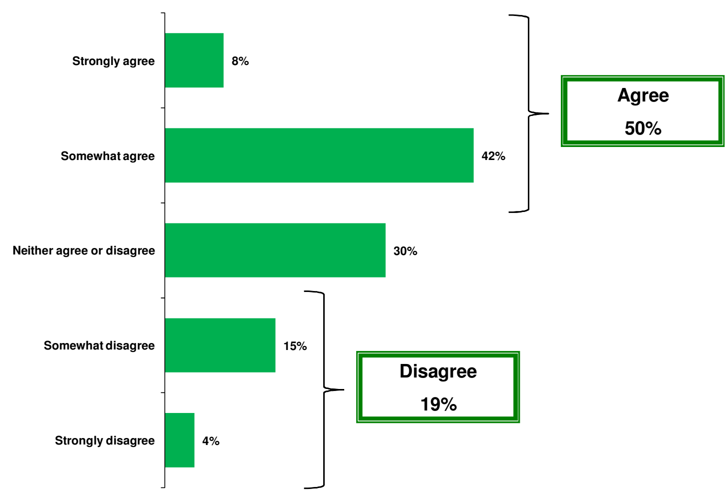


Base: Always/Often/Sometimes look for locally produced products n = 2686

When asked for the main reasons for buying locally produced foods, more than half indicate it relates to supporting the local economy, followed by about one quarter who perceives the product to be fresher. Supporting the local economy was mentioned most often in Quebec, the Maritimes, as well as in rural areas.

Willingness to Pay More for Products Produced Locally

Q6C. Please indicate the extent to which you agree or disagree with the following statement: 'When grocery shopping, I am willing to pay more for products that are produced locally'.

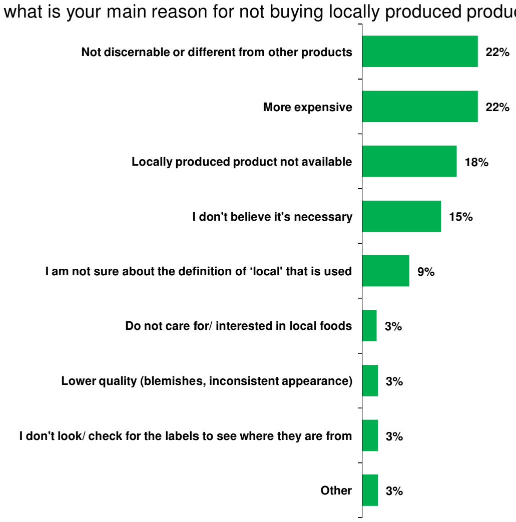


Base: Always/Often/Sometimes look for locally produced products n = 2686

Half of all respondents agree, to some extent, that they are willing to pay more for products produced locally, while one in five disagree. Among those who always, often or sometimes purchase locally produced products, 8% strongly agree. Willingness to pay more for locally produced foods increases dramatically for those with higher incomes; only 32% of those in households earning less than 20K are willing to pay a premium, while 60% in households earning more than $100,000 are either somewhat or very willing to pay a premium. As with income, as age increases, so does willingness to pay a premium, 58% of respondents 55 years or older agree that they are willing to pay a premium compared to 45% of respondents between 18 and 34 years of age and 47% of respondents between the ages of 35 and 54. Women also have a significantly higher propensity towards paying a premium for locally produced products than men.

Reasons for not Purchasing Locally Produced Products

Q6E. You mentioned that you rarely or never purchased locally produced foods when grocery shopping. In your opinion what is your main reason for not buying locally produced products?



Base: Respondents who Rarely/Never purchase locally produced products n = 458

Respondents who claim to rarely or never purchase locally produced products were asked their main reasons for not doing so. More than one in five of these respondents mention they do not find locally produced products to be discernable or different from other products, this is prevalent among those living in urban areas, 23% versus only 21% of respondents living in rural areas. One in five respondents mention that they believe locally produced products to be more expensive, and 18% say they are not available. 15% of respondents don't believe it is necessary to purchase locally produced products.

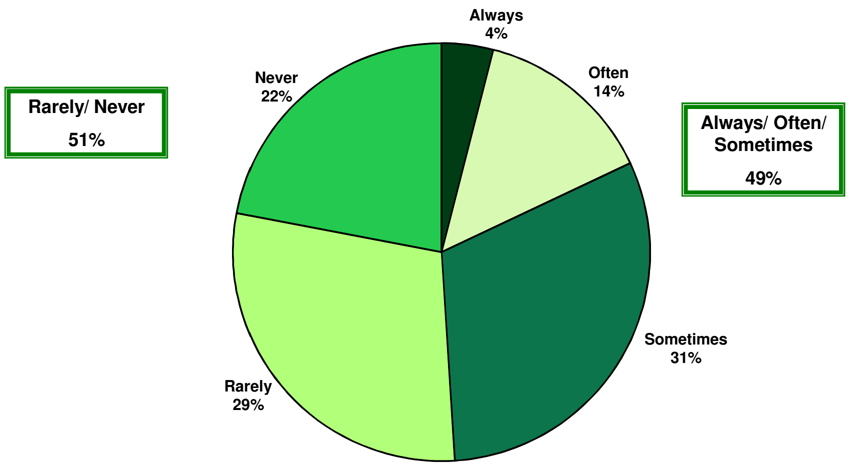
ORGANICALLY PRODUCED SECTION

The following section focuses on organically produced products, and provides information on the frequency with which Canadians seek organically produced foods when grocery shopping, followed by the open ended responses given by those who rarely or never purchase organics as to their rationale behind this decision.

Information is provided from respondents who always, often or sometimes purchase organically produced products as to what their perceived benefits of organics are, their willingness to pay more for these products, awareness of the 'Canadian Organic' Standard, and their likelihood to seek products with this standard.

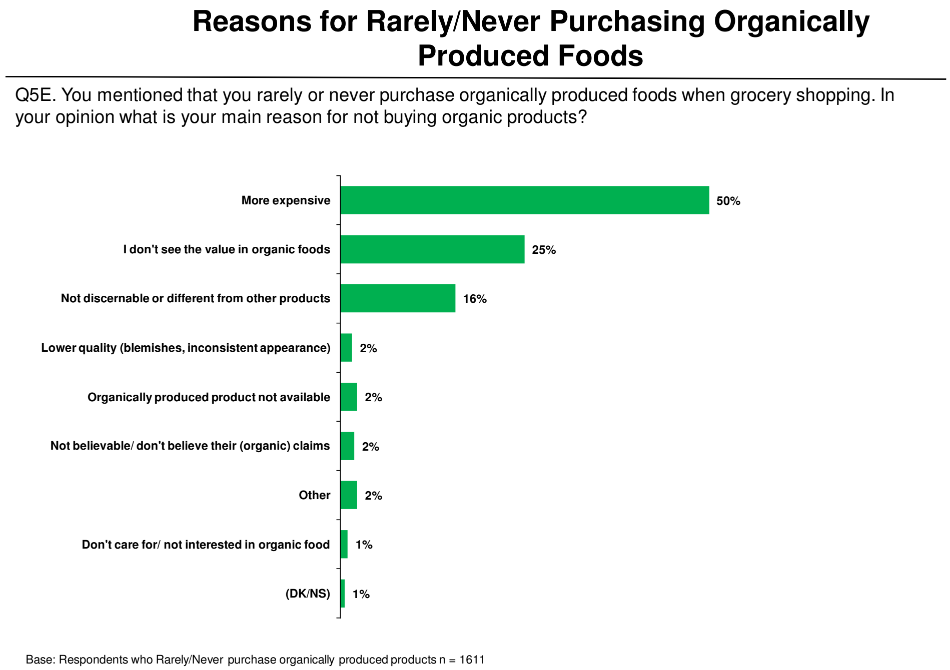
Frequency Seeking Organically Produced Products when Grocery Shopping

Q3. Listed below is a number of attributes which you may or may not look for when grocery shopping or dining away from home. Please indicate how frequently you seek food items with each attribute using the scale provided.

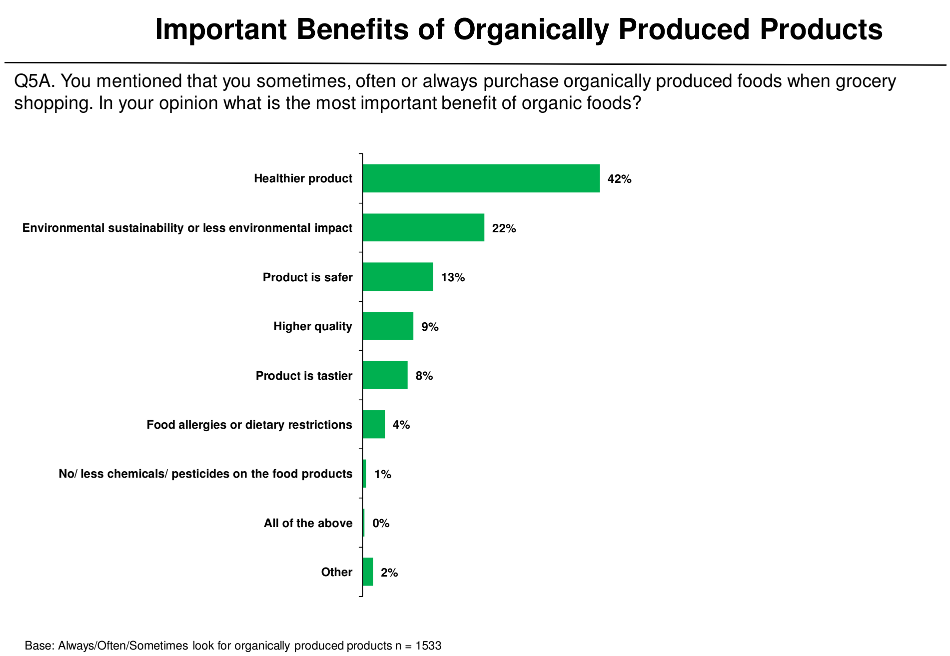


Base: All respondents: n = 3144

As displayed earlier, 49% of Canadians claim they always, often or sometimes seek organically produced products when grocery shopping. Slightly more than have of respondent's state they rarely or never purchase organically produced products, the following graph displays the reasons why these people do not purchase organically produced products. Residents of British Columbia (58%) are significantly more likely to seek out organically produced products than all other provinces. 55% of women always, often or sometimes seek organically produced products, significantly higher than the 44% of males who said the same. As respondent age increases, propensity to purchase organics also increases, but no other trends exist among demographic or socio-economic segments.



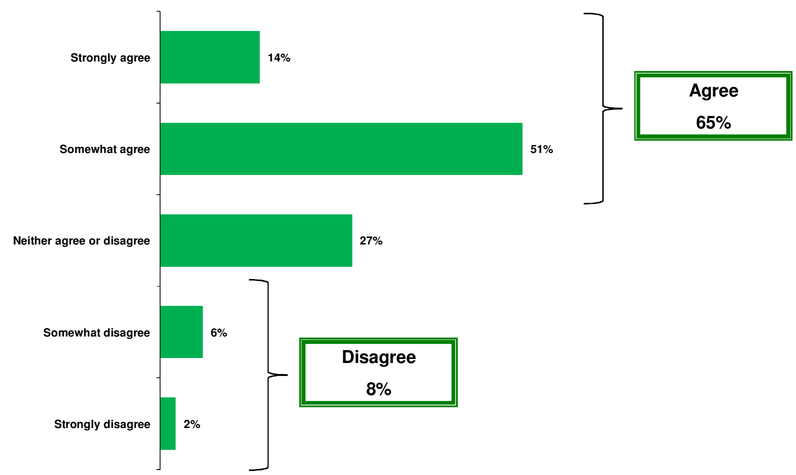
Respondents who rarely or never purchase organically produced products are more likely to state that it is because they believe organically produced products are more expensive (50%), followed by, to a lesser extent not seeing the value in organic foods (25%), and not being discernable or different from other products (16%).



Respondents who always, often or sometimes seek organically produced products were asked their reasons for preferring this type of production. The most frequent mentions being a healthier product as a benefit of organically produced products (42%), followed by a lesser environmental impact (22%), products being safer (13%), tastier (8%) and higher quality (9%).

Willingness to Pay More for Products Labelled "Canadian Organic"

Q5D. Please indicate the extent to which you agree or disagree with the following statement: 'When shopping for organic foods, I am willing to pay more for products that are labeled Canadian Organic'.

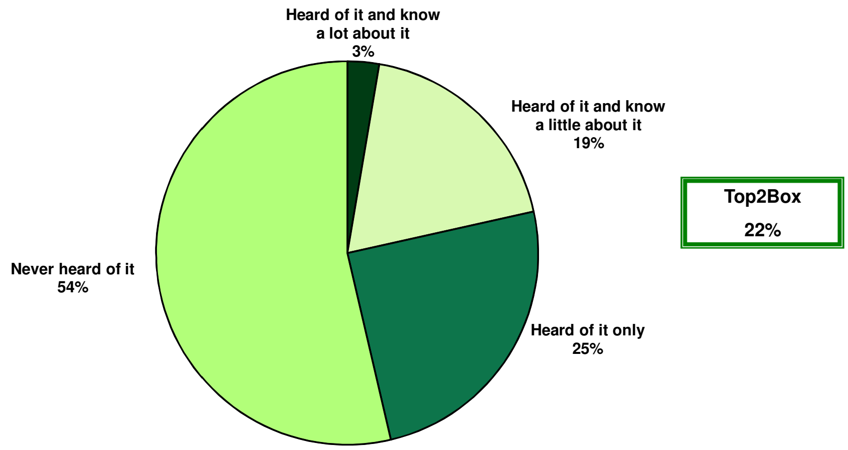


Base: Respondents who Always/Often/Sometimes search for products labeled 'Canadian Organic Standard' n = 279

Although only 14% of respondents strongly agree that they would be willing to pay more for organic products, 51% are somewhat willing to pay a premium for organic products. Willingness to pay a premium for organically produced products is relatively high across all provinces, except Quebec, where only 44% strongly/somewhat agree they are willing to pay more. Respondents living in urban areas are also significantly more likely to be willing to pay more than those living in rural areas (70% vs. 56% respectively). There does not appear to be any other significantly differences across other demographic or socio economic groups.

Awareness of 'Canadian Organic Standard'

Q5B. Are you aware of the new 'Canadian Organic' standard that came into effect in June, 2009?

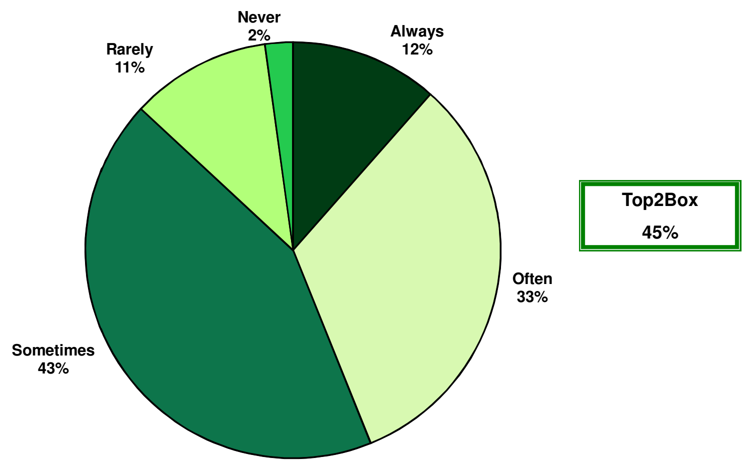


Base: Always/Often/Sometimes look for organically produced products n = 1533

3% of respondents claim to have heard the 'Canadian Organic' Standard and know a lot about it, while 19% have heard of it, but only know a little about it, conversely, more than half of respondent's reveal that they have never heard of it. Awareness of the 'Canadian Organic' standard is equal across demographic groups. Despite having a significantly higher percentage of consumers who always or often purchase seek organically produced products that the national average (28% vs. 19%) residents in British Columbia did not demonstrate a higher awareness level of the 'Canadian Organic' Standard than the rest of the provinces.

Likelihood to Seek 'Canadian Organic Standard'

Q5C. Thinking of when you buy organic products, please indicate how frequently you seek organic items that are labeled 'Canadian Organic'?



Base: Respondents aware of 'Canadian Organic Standard' n = 319

Of Canadians aware of the 'Canadian Organic' Standard 45% of them always or often seek this label on the organic products they purchase, only 13% claim to rarely or never to look for this certification. Respondents in British Columbia, Alberta and the Atlantic provinces report the highest likelihood to seek out this certification. Respondents located in urban areas are also more likely to seek products with the 'Canadian Organic' Standard than those in rural areas (47% vs. 40%).

Specialty Food Certification Section

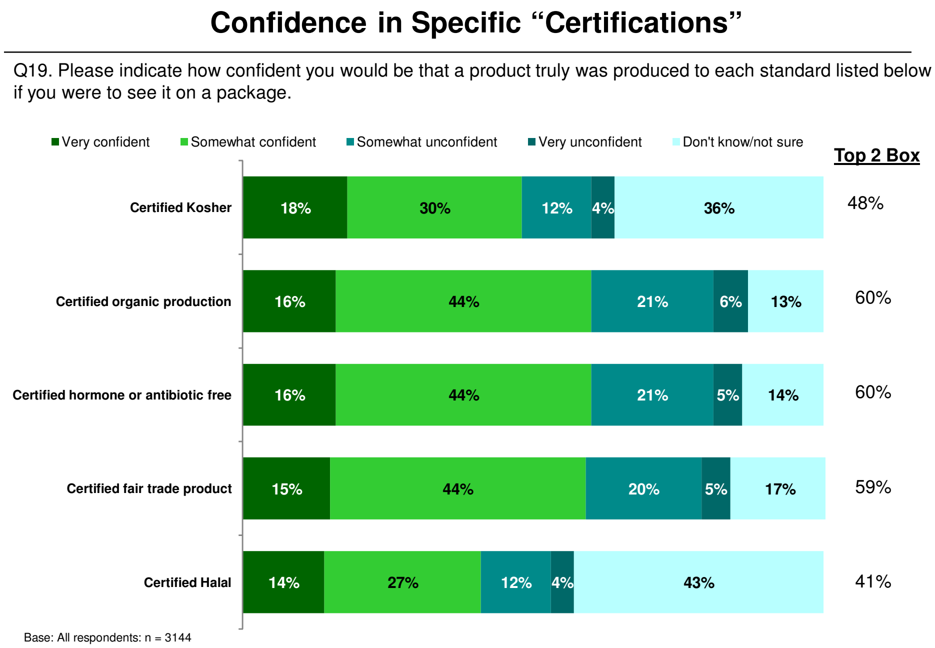
This section captures respondent's definitions of what "certification" in food products means as well as measuring confidence in specific certifications, displaying both the total results, and the results filtered with all 'don't know/ not sure' selections removed.

For half of Canadian respondents, the term 'certification' as it relates to food products means, a government agency has done an audit to be sure the product meets the requirements of the standard it claims to meet. One in five Canadians feel 'certification' means the producer of the product has done an internal audit to ensure standards have been met. Slightly less than one in five Canadians feel that 'certification' means an independent company has done an audit to be sure the product meets the requirements of the standard it claims to meet. Conversely, approximately one quarter of Canadians say that they either don't know or are not sure what 'certification' means as it relates to food products.

Significantly more respondents in Quebec (56%) associate the term 'certification' with the definition of a government agency has done an audit to be sure the product meets the requirements of the standard it claims to meet than respondents in all other provinces (51% national average) except for Saskatchewan (54%) . Respondents in Quebec were also significantly less likely than all other provinces to state that they don't know or are not sure what the term 'certification' means as it relates to food products (19% vs. 24% national average).

Men are less likely than women to state that they don't know or aren't sure what the term 'certification' means, but are statistically more likely to associate this definition with either the producer of the product has done an internal audit to ensure standards have been met or an independent company has done an audit to be sure the product meets the requirements of the standard it claims to meet.

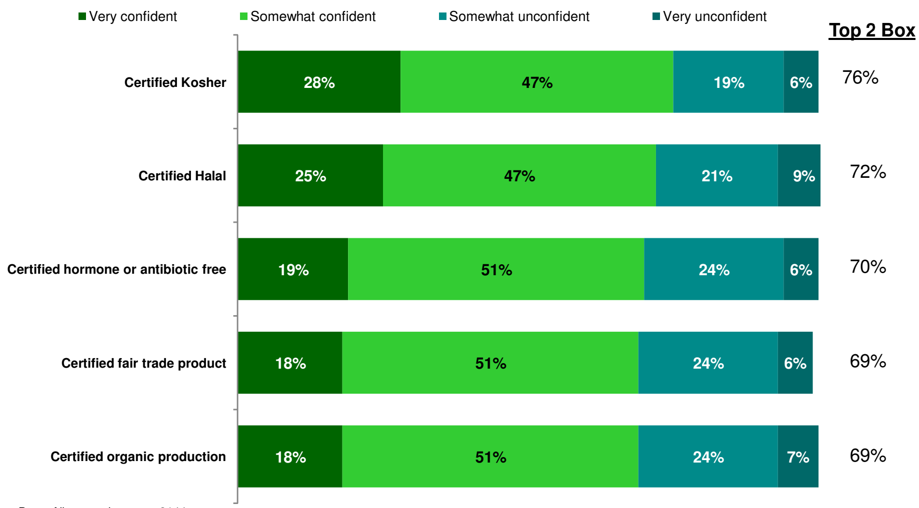
Respondents between the ages of 18 and 34 are much less likely than those 35 and older to think that 'certification' means a government agency has done an audit to be sure the product meets the requirements of the standard it claims to meet. Those with a university education are less likely to associate it with government involvement and significantly more likely to feel believe the producer of the product has done an internal audit to ensure standards have been met or an independent company has done an audit to be sure the product meets the requirements of the standard.



Although, Kosher products have the highest percentage of respondents who are very confident that the product is truly was produced to its 'certification' standard, when combining those who are very and somewhat confident it ranks second last, largely due to a significant proportion that are unsure. Approximately 60% of Canadians are at least somewhat confident that organically produced, hormone/ antibiotic free products or fair trade meet their certified standard. Confidence is lowest in Halal products with 41% of Canadians being at least somewhat confident in its certification, however, also driven by a large proportion of respondents who are unsure. Women are more likely to be confident in all certifications than men, as are those between the age of 18 and 34, than respondents above the age of 35. Respondents in urban areas are statistically more likely to be somewhat or very confident in the certification of both Kosher and Halal than those in rural regions.

Confidence in Specific "Certifications" (Don't Know Removed)

Q19. Please indicate how confident you would be that a product truly was produced to each standard listed below if you were to see it on a package.

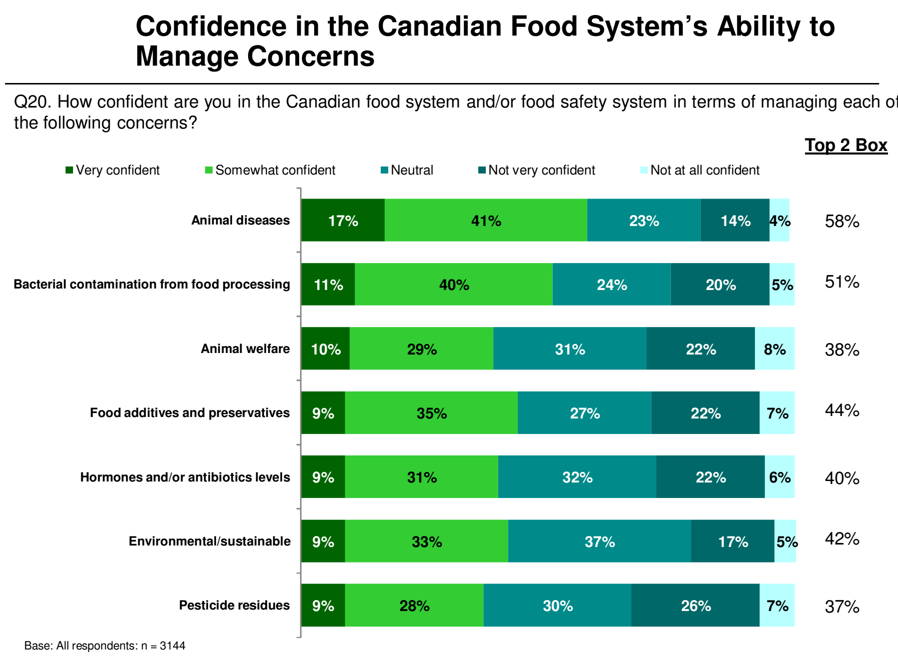


Base: All respondents: n = 3144

In looking at the same question, but with removing all respondents who said they don't know, it can be seen that the highest confidence in certification is for Kosher and Halal products. In using this measure, approximately seven in ten Canadians are at least somewhat confident in the validity of confidence in each of the products.

SAFETY AND QUALITY ENFORCEMENT SECTION

Within this section, confidence in the Canadian food system's ability to manage concerns is measured, as is respondent perceptions with what organizations they believe are responsible for both setting and enforcing various food safety and quality standards.



In general, respondents have the highest confidence in Canada's ability to manage animal diseases, followed by bacterial contamination from food processing. Approximately 40% of respondents are at least somewhat confident in Canada's ability to manage animal welfare, food additives and preservatives, hormone and/or antibiotic levels, environmental sustainability, and pesticide residues. Respondents in Ontario and Saskatchewan are significantly more confident on all concerns than respondents in all other provinces. Men also have higher confidence than females on all measures except for environmental sustainability. Although, not always statistically significant, a trend can be seen in both age and education level, as age education level increases, the percentage of respondents who are not very or not at all confident in the Canada's ability to manage food safety concerns increases. This trend is not evident within income.

Responsible for Setting Food Safety and Quality Standards

Q16. Please identify the organization(s) which you feel are responsible for setting ... standards and/or policies in Canada. And who do you feel should be responsible for setting ... standards and/or policies in Canada?

Believe Are Responsible	CFIA	Agri-Food Industry Ass.	Food Companies	Independent Experts	Advocacy Groups	International Gov't Org.	No one is responsible	Don't Know/ Not Sure
Food Safety	73%	29%	31%	18%	14%	27%	1%	12%
Organic Production	50%	34%	27%	18%	18%	23%	3%	23%
Fair Trade	34%	23%	23%	17%	20%	36%	4%	28%
Hormone or Antibiotic Free	54%	30%	28%	17%	16%	26%	2%	24%
Halal / Kosher	27%	16%	20%	16%	19%	17%	3%	46%
Environmentally Sustainable	44%	28%	25%	18%	18%	28%	4%	26%

Feel Should be Responsible	CFIA	Agri-Food Industry Ass.	Food Companies	Independent Experts	Advocacy Groups	International Gov't Org.	No one is responsible	Don't Know/ Not Sure
Food Safety	56%	26%	24%	39%	24%	25%	2%	13%
Organic Production	46%	26%	20%	29%	23%	22%	2%	20%
Fair Trade	30%	22%	19%	27%	23%	31%	2%	26%
Hormone or Antibiotic Free	48%	23%	19%	30%	22%	23%	2%	22%
Halal / Kosher	26%	16%	15%	22%	21%	16%	4%	43%
Environmentally Sustainable	38%	22%	21%	31%	26%	28%	2%	23%

CFIA leads all other organizations for both being perceived as responsible and actually doing so on all standards tested except fair trade and religious standards such as Halal and Kosher.

Responsible for Enforcing Food Safety and Quality Standards

Q17. Please identify the organization(s) which are responsible for enforcing … standards and/or policies in Canada. And who do you feel should be responsible for enforcing Fair trade standards and/or policies in Canada?

Believe Are Responsible	CFIA	Agri-Food Industry Ass.	Food Companies	Independent Experts	Advocacy Groups	International Gov't Org.	No one is responsible	Don't Know/ Not Sure
Food Safety	71%	23%	25%	16%	12%	23%	2%	16%
Organic Production	43%	26%	20%	14%	16%	19%	4%	30%
Fair Trade	28%	17%	17%	14%	16%	32%	5%	33%
Hormone or Antibiotic Free	50%	22%	19%	14%	13%	21%	3%	30%
Halal / Kosher	25%	13%	16%	14%	17%	15%	4%	49%
Environmentally Sustainable	37%	22%	18%	14%	16%	25%	6%	33%

Feel Should be Responsible	CFIA	Agri-Food Industry Ass.	Food Companies	Independent Experts	Advocacy Groups	International Gov't Org.	No one is responsible	Don't Know/ Not Sure
Food Safety	58%	22%	23%	28%	19%	21%	2%	16%
Organic Production	42%	25%	18%	25%	19%	19%	3%	26%
Fair Trade	28%	19%	16%	24%	20%	30%	3%	31%
Hormone or Antibiotic Free	47%	22%	18%	25%	19%	20%	2%	26%
Halal / Kosher	25%	13%	14%	21%	19%	14%	4%	45%
Environmentally Sustainable	36%	24%	19%	26%	21%	25%	2%	29%

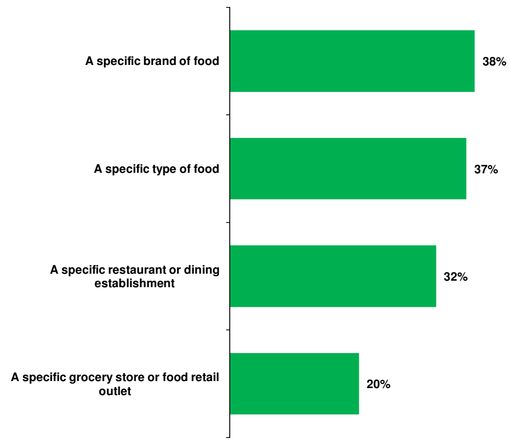
As with standard setting, CFIA is broadly recognized as the appropriate entity to enforce standards with the exception of fair trade, Halal and Kosher. Through comparing the percentage of respondents who believe independent experts and/or advocacy groups are responsible for enforcing food safety and quality standards and those who should be responsible for enforcing food safety and quality standards the strong increase in survey data suggests many Canadians would like to see greater involvement from independent experts and or advocacy groups.

FOOD AVOIDANCE AND BOYCOTT SECTION

The following section presents the types of food products respondents have avoided buying during the past twelve months as well as capturing the main reasons for doing so.

Avoided Buying Any Foods in Past 12 Months

Q21. Thinking back over the past 12 months, have you avoided buying any of the following?



Base: All respondents: n = 3144

More than one third of Canadians claim to have avoided purchasing a specific brand of food or a specific type of food over the past twelve months, while approximately three in ten Canadians have avoided eating at a specific restaurant or dining establishment over the last year. Almost one in five have avoided a specific grocery store or food retail outlet.

Respondents from urban regions are significantly more likely to avoid a specific restaurant or grocery store than those from rural regions. There is no significant difference between the various income levels and their likelihood to avoid any types of food, except for those earning from $60,000 to $100,000 who are more likely have avoided eating at a specific restaurant or dining establishment. Respondents with a university degree or college/apprenticeship certificate are significantly more likely to have avoided each of the four categories than respondents with lower education. In terms of age, those between 18 and 34 years of age are most likely to have avoided a specific grocery store or restaurant than all others, while those 55 years or older are most likely to have avoided a specific type of food in the past twelve months. Although there are minor differences between genders, women were statistically more probable to have avoided a specific food over the past year.

Avoided Buying Any Foods in Past 12 Months

Q21. Thinking back over the past 12 months, have you avoided buying any of the following?

	Ontario (n=536)	Quebec (n=520)	British Columbia (n=420)	Alberta (n=415)	Saskatchewan (n=410)	Manitoba (n=409)	Atlantic (n=434)
A specific brand of food	42%	35%	38%	37%	36%	32%	36%
A specific type of food	40%	33%	43%	39%	34%	36%	34%
A specific restaurant or dining establishment	32%	30%	38%	35%	35%	30%	26%
A specific grocery store or food retail outlet	21%	19%	26%	22%	16%	16%	12%

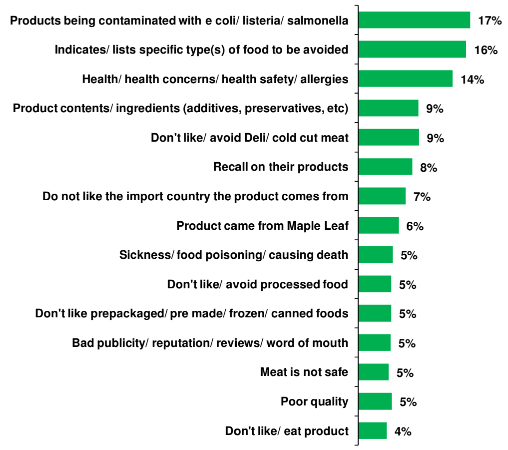
Base: All respondents: n = 3144

Ontario has the highest percentage of respondents who have avoided a specific brand of food in the past twelve month, while those in British Columbia are significantly more likely to have avoided a specific type of food, a specific restaurant/dining establishment or a specific grocery store/food retail outlet than those from all other provinces.

Respondents from the Atlantic Provinces are least likely to have avoided a specific restaurant of all provinces or a specific grocery store or food retail outlet.

Reasons for Avoiding Buying a Specific Type of Food (Open-Ended)

Q22_1. [a specific type of food] You indicated that you have avoided buying A specific type of food during the past 12 months. What were/are the main reasons why?



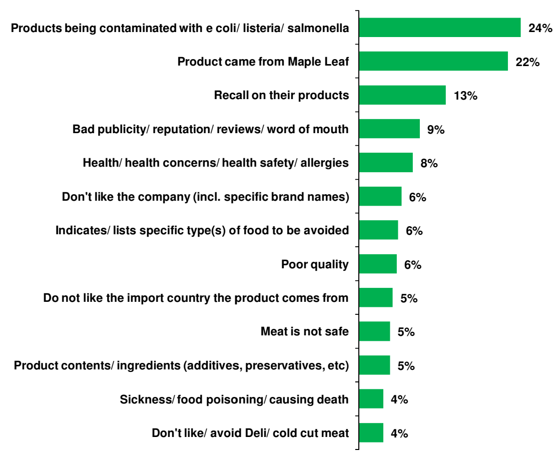
* Responses 3% and less not shown

Base: Respondents who have avoided purchasing a specific type of food in past 12 months n = 1154

The most frequently stated reasons for avoiding a specific type of food are products being contaminated with E. coli/listeria/salmonella and health concerns regarding safety/allergies. Although there is not a true consensus in terms of why a specific food has been avoided, some of the other most frequently mentioned reasons include product contents (additives, preservatives), product recalls, not liking cold cut meats, and/ or products produced by Maple Leaf.

Reasons for Avoiding Buying a Specific Brand of Food (Open-Ended)

Q22_2. [a specific brand of food] You indicated that you have avoided buying A specific type of food during the past 12 months. What were/are the main reasons why?



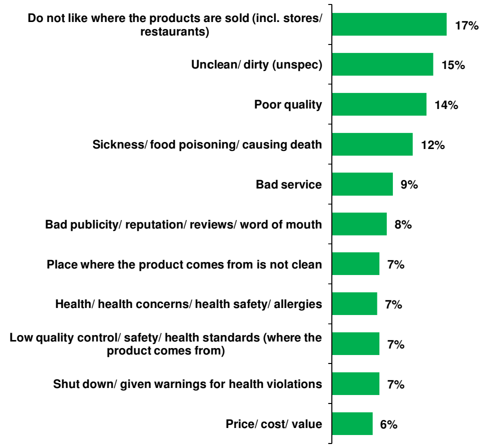
* Responses 3% and less not shown

Base: Respondents who have avoided purchasing a specific brand of food in past 12 months n = 1159

Respondents who have avoided a specific brand of food in the past twelve months are most likely to mention concerns relating to Maple Leaf Foods.

Reasons for Avoiding Eating at a Specific Restaurant or Dining Establishment (Open-Ended)

Q22_4. [a specific restaurant or dining establishment] You indicated that you have avoided buying A specific type of food during the past 12 months. What were/are the main reasons why?



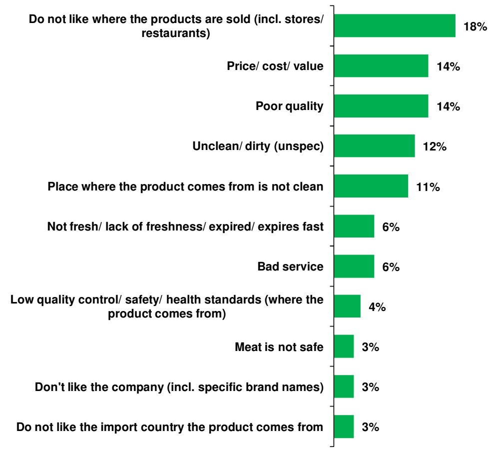
* Responses 3% and less not shown

Base: Respondents who have avoided eating specific restaurant or dining establishment in the past 12 months n = 1005

Not liking the restaurant, perceived poor quality, being unclean, contracting an illness and bad service are the most commonly mentioned reasons for avoiding a specific restaurant or dining establishment in the past twelve months.

Reasons for Avoiding A Specific Grocery Store or Retail Food Provider (Open-Ended)

Q22_3. [a specific grocery store or retail food provider] You indicated that you have avoided buying A specific type of food during the past 12 months. What were/are the main reasons why?



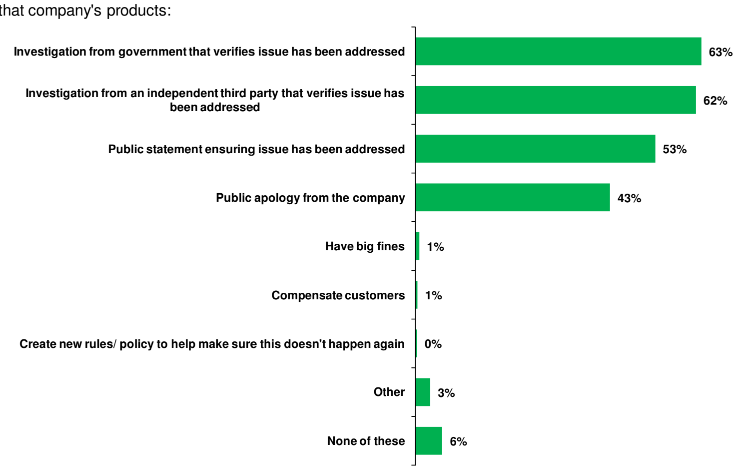
* Responses 2% and less not shown

Base: Respondents who have avoided purchasing from a specific grocery store or retail food provider in the past 12 months n = 598

Respondents who have avoided a specific grocery store or food retail outlet in the past twelve months are most likely to state that it is because they don't like where the food is being sold, the prices of products, having poor quality, being unclean or the perceiving the place the product comes from as being unclean.

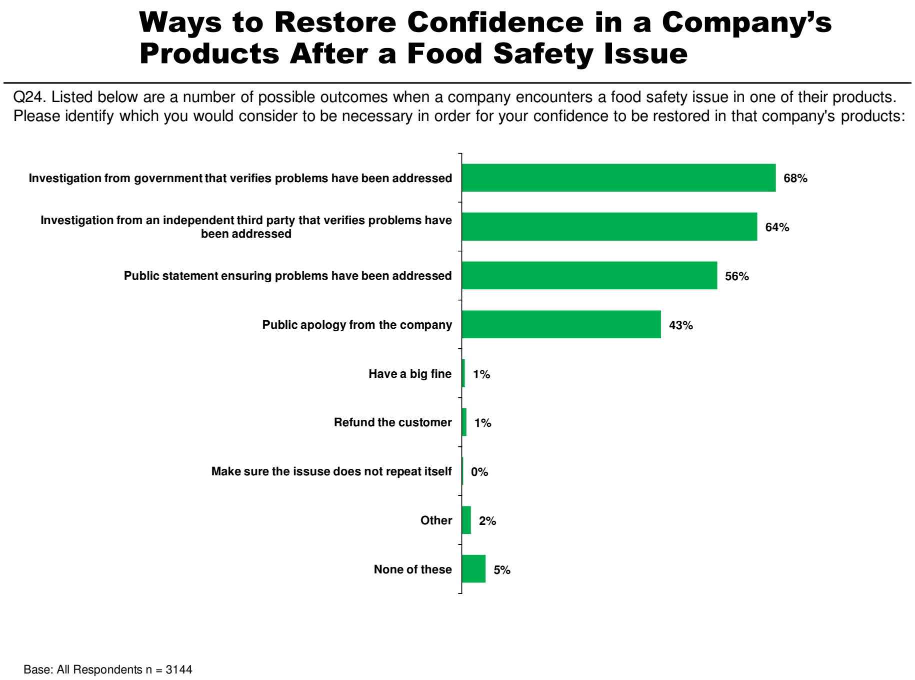
Ways to Restore Confidence in a Company's Products After a Failed Claim

Q23. Listed below are a number of possible outcomes when a company encounters an issue where one of their products does not deliver on a product claim. Please identify which you would consider to be necessary in order for your confidence to be restored in that company's products:



Base: All Respondents n = 3144

Almost two thirds of respondents say that the best way for a company to restore their confidence in its products after a failed claim is determined by either an investigation from the government that verifies the issues have been addressed or an investigation from an independent third party that verifies the issue has been addressed. More than half of respondents would require a public statement from the company stating that the issue has been resolved. Four in ten respondents would require a public apology from the company.



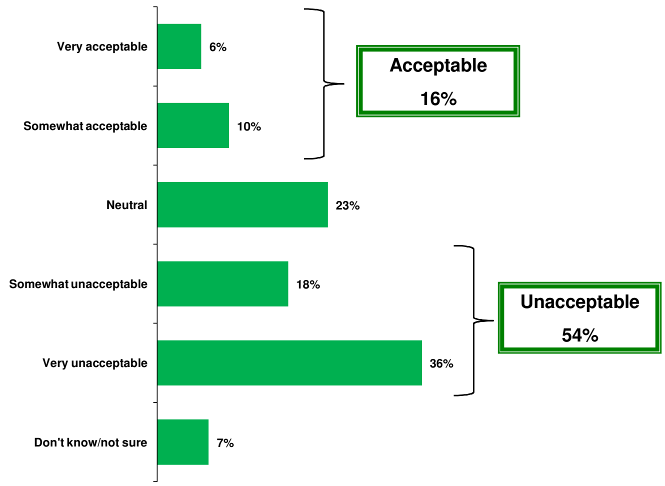
Similar to a failed food claim, approximately two thirds of respondents would require an investigation from either government or an independent third party that verifies the problems have been addressed in order to restore their confidence in a company's products after a food safety issue. More than half of respondents would require a public statement from the company ensuring the problems have been addressed and approximately four in ten respondents would require a public apology from the company.

LIVESTOCK CLONING SECTION

This section captures overall respondent attitudes towards the use of cloning technologies in general as well as respondent acceptance towards the use of cloning technologies in livestock animals for entry into the food system.

Overall Attitudes Towards Using Cloning Technologies

Q7A. In general, please indicate the extent to which you find the use of cloning technology on animals acceptable or unacceptable.

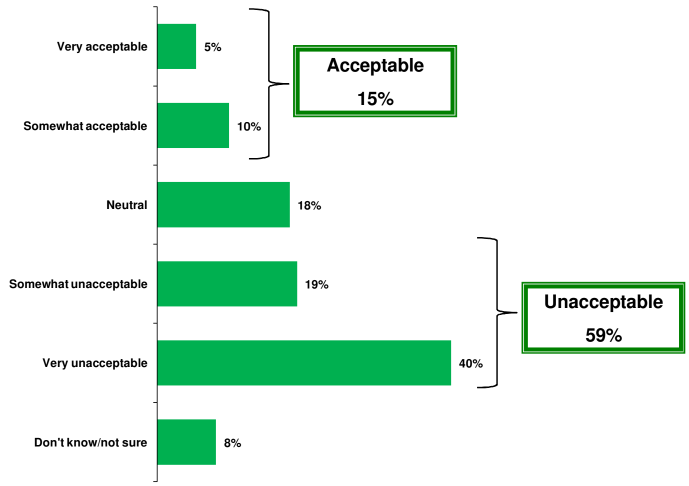


Base: All respondents n = 3144

Only 16% of Canadians find the use of cloning technology on animals either very or somewhat acceptable, while more than half of Canadians find it either somewhat or very unacceptable. Interestingly, more than one in five Canadians are neutral towards this issue, and 7% either don't know or aren't sure of their overall attitude towards the use of cloning technologies. Generally speaking, willingness to accept the use of cloning technologies is strongest among males (23% vs. 9%), and those between the ages 18-34, as well as those with a university education. However, acceptance for cloning is a minority in all demographic and socio economic segments.

Attitudes Towards Using Cloning Technologies in Livestock Animals

Q7B. To what extent do you find the use of cloning technology used on livestock animals for entry into the food system acceptable or unacceptable?



Base: All respondents n = 3144

When asked more specifically whether they accept the use of cloning technologies for the use in livestock animals for entry into the food system 15% of Canadians find it to be at least somewhat acceptable, while 59% believe it to be either somewhat or very unacceptable. Ontario has the highest level of acceptance of all provinces with 17% believing it to be either very or somewhat acceptable, while Quebec and Manitoba have the lowest acceptance at 13%. Once again males are more likely to find cloning livestock for entry into the food system more acceptable then females. Respondents between the ages of 18-34, with a university degree or earn more than $60,000 annually are statistically more likely to have a higher level of acceptance than their counterparts.

APPENDIX 1: DEMOGRAPHICS

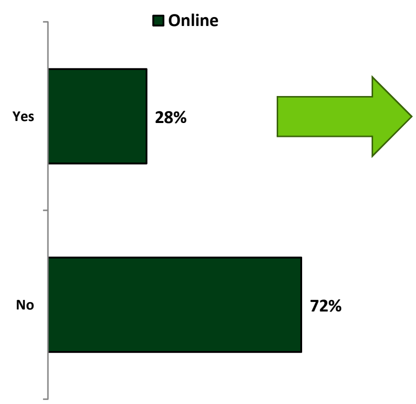
Demographics

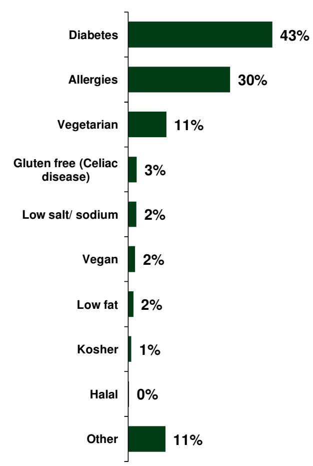
Province	Total
Ontario	536
Quebec	520
British Columbia	420
Alberta	415
Saskatchewan	410
Manitoba	409
New Brunswick	137
Nova Scotia	218
Prince Edward Island	17
Newfoundland	62
Number of People in Household	
1	12%
2-3	61%
4-5	23%
6 or more	4%
Number of Children in Household	
0	66%
1-2	28%
3 or more	6%

Money Spent on Food per Month	
Under $100	2%
$100 to just under $200	8%
$200 to just under $300	14%
$300 to just under $400	18%
$400 to just under $500	21%
$500 to just under $600	15%
$600 to just under $700	11%
$700 or more	13%
Don't know/ not sure	0%
Meals per week not prepared at home	
Less than one	17%
1 to 2	54%
3 to 4	16%
5 or more	14%

Special Dietary Practices

Q27. Do you or anyone in your household follow special dietary practices?
Q28. What dietary practice or practices are being followed?





Base: All Respondents n = 400, n = 1600

Base: Respondents who follow dietary practices n =129, n = 457

Demographics - Continued

Age	
18-29	16%
30-39	16%
40-49	21%
50-59	21%
60-69	18%
70+	8%
Level of Education	
High School diploma or equivalent	47%
Registered Apprenticeship or other trades certificate or diploma	10%
College, CEGEP or other non-university certificate or diploma	22%
University degree, certificate or diploma	15%
None	7%

Household Income	
Under $20,000	8%
$20,000 to just under $ 40,000	20%
$40,000 to just under $ 60,000	18%
$60,000 to just under $ 80,000	14%
$80,000 to just under $100,000	11%
$100,000 to just under $150,000	10%
$150,000 and above	4%
Don't Know/Prefer not to answer	16%
Gender	
Male	50%
Female	50%
Area Lived In	
Downtown centre	16%
Suburban centre	44%
Small town	23%
Rural Area	17%

Demographics - Continued

Marital Status	
Married or living common-law	68%
Single	19%
Divorced/Separated	9%
Widowed	3%
Prefer not to answer	1%
Working Status	
Working full-time, that is, 35 or more hours per week	39%
Working part-time, that is, less than 35 hours per week	10%
Self-employed	8%
Unemployed, but looking for work	6%
A student attending school full-time	5%
Retired	23%
Not in the workforce	8%
Disabled	1%

Appendix 2: Political Neutrality Certification

I hereby certify as Associate Vice President of Ipsos Forward Research that the 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

Colin Siren
Associate Vice President
Ipsos Forward Research

APPENDIX 3: QUESTIONNAIRE

Dear Participant:

On behalf of Ipsos i-Say Panel Team and Ipsos Forward Research, we would like to thank you for your participation in our market research study.

Ipsos Forward Research has been commissioned by the Government of Canada to conduct a study to understand attitudes and perceptions towards food safety and quality. The survey should take approximately **18-20 minutes** to complete and your contribution is very much appreciated, please remember that your participation in the study is voluntary and completely confidential.

Once you qualify and have fully completed the survey you will be awarded 8 reward points as a token of our appreciation.

UNAIDED/AIDED ATTRIBUTE IMPORTANCE SECTION

1. When grocery shopping for food what is most important to you? That is, what are the most important factors that influence which products you buy? *Please be as specific as possible and mention as many factors as appropriate.*

   [OPEN-ENDED TEXT]

   [NOTE TO CODING, CODE FIRST AND ALL RESPONSES SEPERATELY]

2. When dining out or eating at a restaurant, what is most important to you? That is, what are the most important factors that influence which items you buy? *Please be as specific as possible and mention as many things as appropriate.*

   [OPEN-ENDED TEXT]

   [NOTE TO CODING, CODE FIRST AND ALL RESPONSES SEPERATELY]

3. Listed below is a number of attributes which you may or may not look for when grocery shopping or dining away from home. Please indicate how frequently you seek food items with each attribute using the scale provided.

[SCALE – TO APPEAR AS COLUMNS]
Always
Often
Sometimes

Rarely
Never

[LIST – RANDOMIZE ORDER OF ENTIRE LIST, DO NOT SHOW CATEGORY TITLES]
ORIGIN / BRAND CATEGORY
Locally produced
Product of Canada or Made in Canada as part of the label
Reputation of brand / product source
Amount of imported ingredients
Country of origin

PRODUCT ATTRIBUTES
Highest quality available
Best value for money spent
Nutritional value
Convenience
Health claims

ETHICAL / PRODUCTION ATTRIBUTES
Environmentally responsible production
Organic production
Free range
Feed related (i.e. grass or grain fed) – meat products only
Fair trade
Hormone or antibiotic free – meat products only

ETHNIC/LIFESTYLE STANDARDS
Halal
Kosher
Vegan
Vegetarian, but not necessarily vegan

4. Listed below are the features you indicated that you “always” look for in food when grocery shopping or dining away from home. Please indicate which of those you consider to be “deal breakers” or features which absolutely must be present in the food products you purchase. *Please select all that apply.*

[COLUMN HEADER: Features which are deal breakers]

[ONLY SHOW ITEMS WITH ALWAYS SELECTED IN Q3, MULTI-PUNCH DO NOT SHOW CATEGORY TITLES]
None

ORGANIC SECTION

[IF Q3 “OFTEN/ALWAYS/SOMETIMES” SELECTED FOR “ORGANIC PRODUCTION” ASK Q5A/B/C/D]

5A. You mentioned that you sometimes, often or always purchase organically produced foods when grocery shopping. In your opinion what is the most important benefit of organic foods?

[LIST-SELECT ONE ONLY – RANDOMIZE]
Higher quality
Healthier product
Environmental sustainability or less environmental impact
Food allergies or dietary restrictions
Product tastes better
Product is safer
Other: specify

5B. Are you aware of the new 'Canadian Organic' standard that came into effect in June, 2009?

Heard of it and know a lot about it
Heard of it and know a little about it
Heard of it only
Never heard of it

[IF 5B = "HEARD OF IT AND KNOW A LOT/LITTLE" ASK 5C]

5C. Thinking of when you buy organic products, please indicate how frequently you seek organic items that are labeled 'Canadian Organic'?

Always
Often
Sometimes
Rarely
Never

[IF 5C = "ALWAYS/OFTEN/SOMETIMES" ASK 5D]

5D. Please indicate the extent to which you agree or disagree with the following statement: "When shopping for organic foods, I am willing to pay more for products that are labeled Canadian Organic".

Strongly agree
Somewhat agree
Neither agree or disagree
Somewhat disagree
Strongly disagree

[IF Q3 "RARELY/NEVER" SELECTED FOR "ORGANIC PRODUCTION" ASK Q5E]

5E. You mentioned that you rarely or never purchase organically produced foods when grocery shopping. In your opinion what is your main reason for not buying organic products?

[LIST-SELECT ONE ONLY – RANDOMIZE]

More expensive
Not discernable or different from other products
Lower quality (blemishes, inconsistent appearance)
Organically produced product not available
I don't see the value in organic foods
Other: specify

LOCALLY PRODUCED SECTION

[IF Q3 "OFTEN/ALWAYS/SOMETIMES" SELECTED FOR "LOCALLY PRODUCED" ASK Q6A/B/C]

6A. You mentioned that you sometimes, often or always purchase locally produced foods when grocery shopping. In your opinion what is the most important benefit of locally produced foods?

[LIST – RANDOMIZE]
Support the local economy
Product is fresher
Product is tastier
Product is safer
Product has less of an environmental impact
Product has a lower price
Other: specify

6B. Thinking of when you go grocery shopping, please indicate how frequently you seek out locally produced food items?

Always
Often
Sometimes
Rarely
Never

6C. Please indicate the extent to which you agree or disagree with the following statement: "When grocery shopping, I am willing to pay more for products that are produced locally".

Strongly agree
Somewhat agree
Neither agree or disagree
Somewhat disagree
Strongly disagree

[ASK TO ALL RESPONDENTS]

6D. In your opinion, which definition below best describes 'locally produced food'?

[LIST – RANDOMIZE]
Products grown or produced within a fixed distance of where they are sold (ie. 50kms, 100 kms)

Products that are grown or produced within a specific township/county/regional municipality, etc.
Products that are grown or produced within a specific province
Products that are grown or produced in Canada
Other: specify

[IF Q3 “RARELY/NEVER” SELECTED FOR “LOCALLY PRODUCED” ASK Q6E]

6E. You mentioned that you rarely or never purchased locally produced foods when grocery shopping. In your opinion what is your main reason for not buying locally produced products?

[LIST-SELECT ONE ONLY – RANDOMIZE]
More expensive
Not discernable or different from other products
Lower quality (blemishes, inconsistent appearance)
Locally produced product not available
I don’t believe it’s necessary
I am not sure about the definition of ‘local’ that is used
Other: specify

[ASK TO ALL RESPONDENTS]

CLONING SECTION

7A) The next few questions relate to the use of technologies to clone animals. Cloning involves the process of creating genetic replicas of animals with desired characteristics.

In general, please indicate the extent to which you find the use of cloning technology on animals acceptable or unacceptable.

Very acceptable
Somewhat acceptable
Neutral
Somewhat unacceptable
Very unacceptable
Don’t know/not sure

Ask all

7B)
In the United States cloning of animals has been used to preserve specific desired genetic traits, so that they might be passed onto the offspring of cloned animals. Food products (such as milk, meat) from the progeny (offspring) of cloned livestock animals, are allowed to enter the food system in the United States. The use of animal cloning techniques have yet to be approved for human consumption in Canada.

To what extent do you find the use of cloning technology used on livestock animals for entry into the food system acceptable or unacceptable?

Very acceptable
Somewhat acceptable
Neutral
Somewhat unacceptable
Very unacceptable
Don't know/not sure

FOOD SAFETY AND QUALITY SECTION

The next few questions relate to the safety and quality of Canadian food.

8. What is your overall impression of the quality of food that is produced in Canada? Is it...

[LIST – SELECT ONE ONLY]
Excellent quality
Good quality
Average quality
Poor quality
Very Poor quality

9. How confident are you that food produced in Canada is safe? Are you...

[LIST – SELECT ONE ONLY]
Completely confident
Very confident
Somewhat confident
Not very confident
Not at all confident

[IF "COMPLETELY CONFIDENT" NOT SELECTED ASK Q10, OTHERWISE SKIP TO Q11.]

10. You indicated you are not completely confident that food produced in Canada is safe. What are the main reasons why? *Please list as many as you like and be as detailed as possible.*

[OPEN-ENDED TEXT]

11. Please identify the degree to which you are confident in the safety of Canadian food when buying groceries in each category listed below using the scale provided.

[LIST - RANDOMIZE]

In-store cut meats, including deli counter cut meats
Pre-packaged meats and deli meats
Dairy
Fruits and Vegetables

Bread/Baked Goods

[SCALE – SELECT ONE ONLY]
Completely confident
Very confident
Somewhat confident
Not very confident
Not at all confident

12. Relative to 5 years ago, would you say that your confidence in the safety of food produced in Canada has...

[LIST – SELECT ONE ONLY]
Increased a lot
Increased a little
Stayed the same
Decreased a little
Decreased a lot

13. And in the past year, have you experienced illness that you thought was due to the food you ate, that is a food borne illness?

Yes
No

[IF YES IN Q13 ASK Q14. OTHERWISE SKIP TO Q15]

14. Thinking about the last time you experienced food borne illness, which of the following do you suspect was the source of the illness? *Please select one only.*

[LIST - RANDOMIZE]
Food prepared at your home
Food prepared at a restaurant or other dining establishment (not including take-out meals)
Food prepared outside of your home, but not from a restaurant or dining establishment (please include dining at friends/family/colleagues)
Food prepared outside of your home, but eaten at home (please include take-away meals, and ready to eat meals)

15. In the past 12 months, have you read, seen or heard about food safety information from the following sources? (Select all that apply)

[LIST – RANDOMIZE]
Yes, but can't remember where [Programmer Note: Always at top and exclusive]

TV, Radio, newspaper, or internet media
Government publication (website or pamphlet)

Non Government publication (website or pamphlet)
Social media (blogs, twitter, facebook)
Movies, books, documentaries
Word of mouth (conversations with family, friends or colleagues)
Other: please specify [*Programmer note: always show second from bottom of list]*
No, I have not heard anything in the past 12 months [*Programmer note: always show last]*

STANDARDS SECTION

The next few questions relate to foods produced to specific standards.

[ASK Q16 IN A LOOP FOR ALL OF THE ATTRIBUTES BELOW WITH A COLUMN FOR I BELIEVE ARE RESPONSIBLE SETTING THE STANDARDS AND ONE FOR I FEEL SHOULD BE RESPONSIBLE FOR SETTING THE STANDARDS]

Q16. Please identify the organization(s) which you feel are responsible for setting ***[INSERT ATTRIBUTE]*** standards and/or policies in Canada. And who do you feel should be responsible for setting ___________ standards and/or policies in Canada?

[ATTRIBUTES – RANDOMIZE]
food safety
organic production
fair trade
hormone or antibiotic free
halal / kosher
environmental / sustainable

[COLUMN 1:LIST "I BELIEVE ARE RESPONSIBLE FOR SETTING THE STANDARDS" – RANDOMIZE, SELECT ALL THAT APPLY]
Canadian Food Inspection Agency
Agri-food industry associations
Food companies
Independent experts or auditing firms
Advocacy groups / Non-government organisations
International government organizations
No one is responsible
Don't know/not sure

[COLUMN 2: LIST "I FEEL SHOULD BE RESPONSIBLE FOR SETTING THE STANDARDS" – RANDOMIZE, SELECT ALL THAT APPLY]
Canadian Food Inspection Agency
Agri-food industry associations
Food companies
Independent experts or auditing firms
Advocacy groups / Non-government organisations
International government organizations

[ASK Q17 IN A LOOP FOR ALL OF THE ATTRIBUTES BELOW WITH A COLUMN FOR I BELIEVE ARE RESPONSIBLE FOR ENFORCING THE STANDARDS AND ONE FOR I FEEL SHOULD BE RESPONSIBLE FOR ENFORCING THE STANDARDS]

Q17. Please identify the organization(s) which are responsible for enforcing ***[INSERT ATTRIBUTE]*** standards and/or policies in Canada. And who do you feel should be responsible for enforcing _______________ standards and/or policies in Canada?

[ATTRIBUTES – RANDOMIZE]
food safety
organic production
fair trade
hormone or antibiotic free
halal / kosher
environmental / sustainable

[COLUMN 1: LIST "I BELIEVE ARE RESPONSIBLE FOR ENFORCING THE STANDARDS" – RANDOMIZE, SELECT ALL THAT APPLY]
Canadian Food Inspection Agency
Agri-food industry associations
Food companies
Independent experts or auditing firms
Advocacy groups / Non-government organisations
International government organizations
No one is responsible
Don't know/not sure

[COLUMN 2: LIST "I FEEL SHOULD BE RESPONSIBLE FOR ENFORCING THE STANDARDS" – RANDOMIZE, SELECT ALL THAT APPLY]
Canadian Food Inspection Agency
Agri-food industry associations
Food companies
Independent experts or auditing firms
Advocacy groups / Non-government organisations
International government organizations

18. Sometimes foods which have been produced to a certain standard are referred to as "certified". If you see the word "certified" on a product, what does it mean? (select all that apply)

[LIST – RANDOMIZE, SELECT ALL THAT APPLY]
The producer of the product has done an internal audit to ensure standards have been met
The buyer has done an audit of the supplier (e.g., a food manufacturer has audited a farm) to ensure standards have been met
An independent company has done an audit to be sure the product meets the requirements of the standard it claims to meet
A government agency has done an audit to be sure the product meets the requirements of the standard it claims to meet
Don't Know / Not Sure

19. Please indicate how confident you would be that a product truly was produced to each standard listed below if you were to see it on a package.

[SCALE]
Very confident
Somewhat confident
Somewhat unconfident
Very unconfident
Not sure/Don't know

[LIST – RANDOMIZE]
Certified organic production
Certified fair trade product
Certified hormone or antibiotic free – meat products only
Certified Halal
Certified Kosher

ASSURANCE SYSTEMS SECTION

The next few questions relate to the Canadian food system including both government and industry organizations.

20. How confident are you in the Canadian food system and/or food safety system in terms of managing each of the following concerns?

[RESPONSES – SHOW AS COLUMNS]
Very Confident
Somewhat confident
Neutral
Not very confident
Not at all confident

[LIST – RANDOMIZE]

Food additives and preservatives
Animal diseases (example: Mad Cow Disease or Avian Influenza)
Bacterial contamination from food processing (example: E. coli and salmonella)
Hormones and/or antibiotics levels
Pesticide residues
Animal welfare
Environmental/sustainable

21. Thinking back over the past 12 months, have you avoided buying any of the following?

[RESPONSES]

Yes
No

[LIST – RANDOMIZE]
A specific type of food
A specific brand of food
A specific grocery store or food retail outlet
A specific restaurant or dining establishment

[ASK Q22 FOR EACH "YES" IN Q21. OTHERWISE CONTINUE TO Q23]

22. You indicated that you have avoided buying [INSERT FROM Q24] during the past 12 months. What were/are the main reasons why? *Please be as specific as possible.*

[OPEN-ENDED TEXT]

23. Listed below are a number of possible outcomes when a company encounters an issue where one of their products does not deliver on a product claim. Please identify which you would consider to be necessary in order for your confidence to be restored in that company's products: *Please select all that apply.*

[LIST]
Public apology from the company
Public statement ensuring issue has been addressed
Investigation from an independent third party that verifies issue has been addressed
Investigation from government that verifies issue has been addressed
Other: SPECIFY
None of these [EXCLUSIVE]

24. Listed below are a number of possible outcomes when a company encounters a food safety issue in one of their products. Please identify which you would consider to be necessary in order for your confidence to be restored in that company's products: *Please select all that apply.*

[LIST]
Public apology from the company
Public statement ensuring problems have been addressed
Investigation from an independent third party that verifies problems have been addressed
Investigation from government that verifies problems have been addressed
Other: SPECIFY
None of these [EXCLUSIVE]

25. And including yourself, how many people live in your household? _______
[RANGE 1-10 or more]

[IF Q25=1, AUTOCODE Q26 WITH 0 AND GO TO Q27]
26. How many children under the age of 18 live in your household?

______ [RANGE 0-10 or more, MUST BE LESS THAN TOTAL IN Q25]
Refused

27. A) Do you or anyone in your household follow special dietary practices (for example, vegetarian, allergies, diabetic, etc.)?

Yes (if yes ask q28b)
No (skip to Q29)

28. b) What dietary practice or practices are being followed?

Allergies
Diabetes
Vegetarian
Vegan
Halal
Kosher
Other (specify)

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

____
[ALLOW UP TO A 3 DIGIT NUMBER]
30. In an average week, how many meals do you eat that were not prepared at home?

____
[RANGE 0-50]

31. In what year were you born? ________
[RANGE 1900 to 1992]

32. Are you…?

Married or living common-law
Single
Widowed
Divorced/Separated
Prefer not to answer

~~33. How many children, if any, live in your house?~~
~~None~~
~~1~~
~~2~~
~~3~~
~~4~~
~~5+~~
~~Prefer not to answer~~

34. Please select what best describes where you live.

Downtown centre
Suburban centre
Small town
Rural Area

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

Under $20,000
$20,000 to just under $ 40,000
$40,000 to just under $ 60,000
$60,000 to just under $ 80,000
$80,000 to just under $100,000
$100,000 to just under $150,000
$150,000 and above
Don't Know/Prefer not to answer

36. Which of the following diplomas or degrees have you completed?

None
High School diploma or equivalent
Registered Apprenticeship or other trades certificate or diploma
College, CEGEP or other non-university certificate or diploma
University degree, certificate or diploma

37. What is your gender?
Male
Female

38. Which of the following categories best describes your current employment status? Are you

Working full-time, that is, 35 or more hours per week
Working part-time, that is, less than 35 hours per week
Self-employed
Unemployed, but looking for work
A student attending school full-time
Retired
Not in the workforce [FULL-TIME HOMEMAKER, UNEMPLOYED)
Other: Please Specify

[STANDARD ISAY THANK YOU/CLOSING SCREEN]