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POR 065-13
por-rop@ag.gc.ca

Agriculture and Agri-Food Canada / Agriculture et Agroalimentaire Canada

Agriculture and Agri-Food Canada

Consumer Perceptions of Food, Wave 4

Final Report

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Ipsos Reid
1 Nicholas Street, Suite 1400
Ottawa, ON Canada K1N 7B7
Tel: 613.241.5802
Fax: 613.248.7981
www.ipsos.ca

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Political Neutrality Statement

I hereby certify as Senior Officer of Ipsos Reid 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, and standings with the electorate or ratings of the performance of a political party or its leaders.

M. Colledge

Mike Colledge

President

Ipsos Reid Public Affairs

1.0 Executive Summary

1.1 Background and Objectives

Agriculture and Agri-Food Canada (AAFC) has conducted periodic public opinion research (POR) to assess consumer perceptions of food products, including safety, quality and market attribute preferences. AAFC commissioned the first survey (now referred to as Wave 1) in 2004 to support the Agriculture Policy Framework (APF) and repeated the survey in 2006/07 to obtain updated information for ongoing policy development. The most recent survey was the Wave 3 Consumer Perceptions of Food Safety and Quality Survey, conducted by Ipsos-Reid in March 2010 (hereafter the Wave 3 study).

The Government of Canada wanted to update its POR data collection through a new Wave 4 using the same methodology as the previous wave. This research was conducted to measure changes in consumer perceptions, purchase behaviours and preferences for certain food attributes from previous waves, as well as assess consumer perceptions and behaviours with respect to food attributes that have received increased attention from buyers since the previous wave.

The research will be used to inform and shape department, portfolio and industry marketing, promotion and innovation initiatives based on the current state of consumer perceptions of food quality, safety and market attributes in Canada.

The total expenditure on this research was $74,332.80, including HST.

1.2 Methodology Summary

Ipsos-Reid conducted a 23-minute survey among a sample of n=3,020 Canadian adults who have the main or joint grocery shopping responsibilities for the household from each province and territory excluding Quebec, between March 17th and March 25th, 2014 and in Quebec between April 8th and 14th, 2014 following the Quebec provincial election.

The results of this survey cannot be described as statistically representative of the target population, and for this reason, no estimates of sampling error can be calculated.

Weighting was applied to the sample to ensure that the final data reflects the adult population of Canada by region, age and gender according to the 2011 Census.

1.3 Research Highlights

- Canadians feel that food produced in Canada is of good or excellent quality (85%) and most consumers are very or completely confident (56%) in the safety of Canadian food products.
- Value for money (83%) continues to be the top attribute looked for by Canadians when making food purchase decisions in the grocery store or at a restaurant and represents the deal breaker attribute for over half (53%) of Canadians.
- Only half of Canadians read the nutrition facts (46%) or ingredients list (46%) when making food purchase decisions.
- While half (51%) of Canadians look for organic products at least sometimes, only three in ten (30%) of these go on to purchase them, and those that do not purchase them feel that they are too expensive (77%).
- Most Canadians (86%) seek locally produced items to support the local economy (49%) and because they are more fresh (25%).

- Environmentally sustainable products are always or often sought out by half of Canadians (47%) when grocery shopping, a third (33%) of these then often or always purchase these products.
- Animal welfare and free range products that promote the ethical treatment of animals are sought out by just over half (56%) of Canadians when grocery shopping or eating out.
- Canadians are familiar with genetic engineering (51%) but less familiar with irradiation (28%), nanotechnology (25%), and animal biotechnology (20%) and least familiar with high-pressure processing (16%).
- Only half of Canadians (49%) are confident in the Canadian food system's management of concerns regarding animal diseases, down from three in five (59%) in 2010.
- Canadians still rely on television and radio reports (43%) and newspapers (33%) to learn about food and nutrition issues.
- One in three Canadians (27%) indicated that they are influenced by food safety issues and recalls when grocery shopping.

1.4 Conclusion

Canadians continue to feel that food produced in Canada is of good or excellent quality and are confident that it is safe to eat, however confidence in management of concerns is down from 2010.

Many Canadians are somewhat interested in special production methods such as local, organic, humane and environmentally sustainable production claims, but are still very price sensitive and mistrusting of claims made in these areas.

When it comes to new technologies in food production, most consumers are somewhat aware of genetic engineering, less are familiar with irradiation, nanotechnology and animal biotechnology and most had never heard of high-pressure processing. Their levels of trust in these technologies differed, but those who were aware of them were most unlikely to purchase products made using these technologies. Canadians were discerning when it came to the use of irradiation technologies and would prefer to have them labeled as such to allow individuals to make the choice whether to purchase products using these technologies.

2.0 Rapport Sommaire

2.1 Contexte et objectifs

Agriculture et Agroalimentaire Canada (AAC) a mené une recherche sur l'opinion publique (ROP) périodique afin d'évaluer les perceptions des consommateurs à l'égard des produits alimentaires, y compris la salubrité, la qualité et les préférences en matière de caractéristiques de marché. AAC a commandé le premier sondage (désormais appelé « vague 1 ») en 2004 pour soutenir le Cadre stratégique pour l'agriculture (CSA), puis l'a repris en 2006-2007 pour actualiser les renseignements et poursuivre l'élaboration de la politique. La vague 3 du sondage sur les perceptions des consommateurs à l'égard de la salubrité et de la qualité des aliments, mené par Ipsos-Reid en mars 2010 (ci-après appelé « vague 3 »), est la plus récente de la série.

Le gouvernement du Canada souhaitait actualiser ses données de recherche sur l'opinion publique en menant un nouveau sondage, la vague 4, qui ferait appel à la même méthodologie que la vague précédente. La recherche a été réalisée dans le but de mesurer les changements dans les perceptions des consommateurs, les comportements d'achat et les préférences pour certaines caractéristiques d'aliments par rapport aux vagues précédentes. Elle visait en outre à évaluer les perceptions et les comportements des consommateurs en ce qui concerne des caractéristiques d'aliments auxquelles les acheteurs ont davantage prêté attention depuis la vague précédente.

Cette recherche sera utilisée pour documenter et façonner les initiatives du Ministère, du portefeuille et de l'industrie en matière de marketing, de promotion et d'innovation, en tenant compte de l'état actuel des perceptions des consommateurs sur la qualité, la salubrité et les caractéristiques de marché des aliments au Canada.

Le coût total de l'étude s'est élevé à 74 332,80 $, TVH comprise.

2.2 Sommaire de la méthodologie

Ipsos-Reid a réalisé un sondage de 23 minutes auprès d'un échantillonnage de n = 3 020 adultes canadiens principalement ou conjointement responsables des achats d'épicerie dans leur foyer. Le sondage a été mené dans chaque province et chaque territoire, sauf au Québec, du 17 au 25 mars 2014, et au Québec du 8 au 14 avril 2014, soit après les élections provinciales.

Les résultats du sondage ne peuvent être qualifiés de représentatifs de la population cible sur le plan statistique et aucune marge d'erreur ne peut donc être calculée.

La pondération des données a été appliquée à l'échantillonnage pour faire en sorte que les résultats correspondent aux données de la population adulte canadienne par région, par groupe d'âge et par sexe selon les données du Recensement de 2011.

2.3 Faits saillants de la recherche

- Les Canadiens estiment que les aliments produits au Canada sont de bonne ou d'excellente qualité (85 %), et la plupart des consommateurs sont certains ou tout à fait certains (56 %) que les aliments produits au Canada sont salubres.
- Le rapport qualité-prix (83 %) continue d'occuper le premier rang des caractéristiques recherchées par les Canadiens lorsqu'ils font leurs achats d'épicerie ou qu'ils mangent au restaurant, et il s'agit de la caractéristique déterminante pour plus de la moitié des

Canadiens (53 %).

- Seulement la moitié des Canadiens lisent le tableau de la valeur nutritive (46 %) ou la liste d'ingrédients (46 %) pour décider des aliments à acheter.
- Si la moitié des Canadiens (51 %) recherchent des produits biologiques parfois ou plus fréquemment, seulement trois sur dix (30 %) parmi eux en achètent, et ceux qui n'en achètent pas estiment qu'ils coûtent trop cher (77 %).
- La plupart des Canadiens (86 %) recherchent des produits alimentaires produits localement pour soutenir l'économie locale (49 %) et parce qu'ils estiment qu'ils sont plus frais (25 %).
- Les produits issus de méthodes respectueuses de l'environnement sont toujours ou souvent recherchés par la moitié des Canadiens (47 %) lorsqu'ils font des achats d'épicerie, et le tiers (33 %) d'entre eux achètent souvent ou toujours ces produits.
- Les produits issus de pratiques respectant le bien-être des animaux et dérivés d'animaux en liberté sont recherchés par un peu plus de la moitié des Canadiens (56 %) lorsqu'ils font des achats d'épicerie ou qu'ils mangent à l'extérieur de la maison.
- Les Canadiens connaissent le génie génétique (51 %), mais ils en savent moins sur l'irradiation (28 %), la nanotechnologie (25 %) et la biotechnologie animale (20 %), et c'est sur la transformation à haute pression qu'ils sont le moins bien renseignés (16 %).
- Seulement la moitié des Canadiens (49 %) sont certains du système alimentaire canadien pour ce qui est de gérer les maladies animales, en baisse par rapport à trois sur cinq (59 %) en 2010.
- Les Canadiens continuent de se fier aux reportages à la télévision et à la radio (43 %) ainsi qu'aux journaux (33 %) pour se renseigner sur les questions d'aliments et de nutrition.
- Un Canadien sur trois (27 %) indique être influencé par des enjeux liés à la salubrité des aliments et par les rappels pour les décisions d'achats à l'épicerie.

2.4 Conclusion

Les Canadiens sont toujours d'avis que les aliments produits au Canada sont de bonne ou d'excellente qualité et ils sont certains de pouvoir en manger en toute sécurité. Toutefois, les répondants sont moins nombreux qu'en 2010 à faire confiance au système alimentaire canadien pour gérer les aspects qu'ils considèrent préoccupants.

Les Canadiens sont nombreux à manifester un certain intérêt pour les méthodes de production spéciales telles que la production locale, la production biologique, le souci des animaux et la production responsable sur le plan de l'environnement. Toutefois, ils sont encore très sensibles aux prix et se méfient des allégations en cette matière.

En ce qui concerne les nouvelles technologies de production alimentaire, la plupart des consommateurs en savent un peu sur le génie génétique, mais ils en savent moins sur l'irradiation, la nanotechnologie et la biotechnologie animale, et la plupart n'ont jamais entendu parler de la transformation à haute pression. Le niveau de confiance des répondants à l'égard de ces technologies varie, mais ce sont ceux qui les connaissent qui ont le moins tendance à acheter des produits fabriqués à l'aide de ces technologies. Pour ce qui est de l'utilisation des technologies d'irradiation, les Canadiens sont bien renseignés et préféreraient que des étiquettes soient apposées sur les produits touchés de façon à ce que les consommateurs puissent choisir d'en acheter ou non.

3.0 Detailed Methodology

This methodological summary provides the information required within Section 14 of the Standards for the Conduct of Government of Canada Public Opinion Research – Online Surveys.

Ipsos-Reid conducted a 23-minute survey among a sample of n=3,020 Canadian adults who have the main or joint grocery shopping responsibilities for the household. The first group of n=2,470 respondents were conducted between March 17th and March 25th, 2014 in Canada, excluding Quebec.

Due to the Quebec provincial election called for April 7th, fieldwork in Quebec was put on hold until after the election. Fieldwork in Quebec was completed between April 8th and 14th, 2014 following the Quebec provincial election.

It is important to note that respondents for this survey were selected from among those who have volunteered to participate in online surveys. As a result, the results of this survey cannot be described as statistically representative of the target population, and for this reason, no estimates of sampling error can be calculated. When panellists agree to take surveys they join a loyalty program that awards points per each survey they take.

The following table provides the distribution of the sample by province, unweighted.

Province	Proportionate Sampling		Final Sample	
	n=3000		n=3020	
British Columbia	394	13%	454	15%
Alberta (and North)	336	11%	402	13%
Saskatchewan/Manitoba	201	7%	401	13%
Manitoba	108	3.61%	200	7%
Saskatchewan	93	3.09%	201	7%
Ontario	1152	38%	806	27%
Quebec	708	24%	550	18%
Atlantic	209	7%	407	13%
Newfoundland and Labrador	46	1.54%	104	3%
Prince Edward Island	13	0.42%	80	3%
Nova Scotia	83	2.75%	115	4%
New Brunswick	67	2.24%	108	4%

Weighting was applied to the sample to ensure that the final data reflects the adult population of Canada by region, age and gender according to the 2011 Census.

The questionnaire was designed to track key questions from the 2010 wave, as well as the 2004 and 2006 waves, and include additional areas of inquiry for growing trends and emerging issues in Canadian consumers’ perception of the food system.

3.1 Open-Ended versus Closed-Ended Questions

Two main question types were used in this study. One was 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%. However, due to rounding the cumulative total may differ slightly. The rounding technique used is standard, if the decimal place is .5 or greater it gets rounded up to the nearest whole number; if less than .5 it is rounded down to the nearest whole number. In the case of a single response question with multiple options, three options may have .3 responses and be rounded down but if added together would sum to .9 bringing the sum higher than what would appear to be the total if adding the rounded figures presented in the chart.

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.

4.0 Key Findings

4.1 Food Safety and Quality

Canadians feel that food produced in Canada is of good or excellent quality (85%) and most are very or completely confident (56%) in the safety of Canadian food products.

A quarter (24%) of Canadians feels that the quality of food products in Canada is excellent. This has fallen slightly since 2010, when three in ten (30%) of Canadians felt that the quality of food in Canada s excellent. Older respondents (55+ years of age - 88%), Quebecers (89%) and higher income households ($100K or more - 88%) are most likely to view the quality of food in Canada as good or excellent compared to younger respondents (18-34: 80%) and British Columbians (80%).

Nine in ten (92%) Canadians are at least somewhat confident that food produced in Canada is safe, but just one in ten (11%) are completely confident. Ontarians (65% very/completely confident) and those with a lower education (60%) are more likely to be very or completely confident in the safety of Canadian food.

In the past year one in three (38%) Canadians have changed their food purchasing habits due to concerns of quality, while one in four (24%) have changed purchasing habits due to concerns regarding safety.

4.2 Attribute Importance

Value for money (83%) continues to be the top attribute looked for by Canadians when making food purchase decisions in the grocery store or at a restaurant and represents the attribute which absolutely must be present for over half (54%) of Canadians.

Other product specific attributes Canadians are more interested in include nutritional value (68%) and quality (66%). Half of Canadians are interested in brand reputation (58%) or whether it is made in Canada (52%). Slightly more than one in five Canadians are interested in ethical production attributes, such as environmentally responsible (29%), hormone-free (29%) and free range (24%). Less are interested in dietary lifestyle choices such as vegetarian (10%) or vegan lifestyles (5%). This is fairly consistent with the pervious wave in 2010.

Just less than half of Canadians read the nutrition facts (46%) or ingredients list (46%) when making food purchase decisions.

Product labels were found to be an important source of information for those interested in specific product attributes such as organic (85%) or free range (90%) but just three in ten (31%) consumers read the diet or health-related claims on packaging when making a purchase decision.

While half (52%) of Canadians look for organic products at least sometimes, only three in ten (30%) of these often or always purchase them. Those who never look for or purchase organic products feel that they are too expensive (77%).

Half (49%) of those who do not purchase organically produced items indicate they are not confident such products are actually organically produced. However, most indicate they would buy organic products if they were less expensive (83%).

While the majority of Canadians are at least somewhat confident that organically produced items are accurately labeled (60%), most would feel more confident if the products were certified by an independent auditor (40%) or a government agency (32%).

Most Canadians (86%) seek locally produced items to support the local economy (49%) and because they feel they are more fresh (25%).

Of those who purchase local items (48% of seekers), half are willing to pay more (49%) for those products. Those who don't purchase locally produced items feel they are too expensive (37%) or not available where they shop (36%) but would purchase local products if they priced lower (65%) or more readily available (45%). Others feel that locally produced products are not discernable from other products (27%). Most Canadians are confident (86%) locally produced products are accurately labelled, with two in five (37%) feeling that certification by the producer that they are locally produced would improve confidence.

Environmentally sustainable products are at least sometimes sought out by over two thirds of Canadians (68%) when grocery shopping, a third (33%) of these then often or always purchase these products.

Half of those who purchase environmentally responsible food products (47%) are willing to pay more for them. About half (50%) of those indicate they look for certification from independent bodies that authenticate such claims. Among those who do not purchase environmentally sustainable products, 43% find them too expensive while 33% don't trust such claims. Again, a sizeable proportion of non-purchasers (65%) indicate lower prices would motivate them more to purchase these products. Most Canadians are skeptical that environmentally sustainable products are accurately labeled in stores (64% are not completely confident). However, a sizeable proportion of Canadians indicate certification by an independent auditor (42%) or government agency (32%) would improve their confidence.

Products with humane animal welfare production claims such as free range products are at least sometimes sought out by just over half (56%) of Canadians when grocery shopping or eating out.

Of those who look for these types of products, one in three (36%) often purchase them. The ethical (36%) and health (27%) benefits are the most important to those purchasing these products. Most of those looking for free range products (63%) are willing to pay more for them, but price is the main barrier for two in five of those who do not purchase (44%) with over half admitting they would purchase them if they were priced lower (56%).

One in three (32%) of those who do not purchase products with humane production claims are not confident they are produced under humane conditions and only 14% of Canadians are confident they are accurately labeled.

4.3 Food Technologies

Canadians are familiar with genetic engineering (52%) but less familiar with irradiation (28%), nanotechnology (25%) and animal biotechnology (20%) and least familiar with high-pressure processing (16%).

Three in ten (28%) Canadians have heard of irradiation used in food production; and one in four (25%) are in favour of its use.

When presented with a definition of irradiation, Canadians are divided in their feelings about its use. While three in ten (30%) are in favour of its use, one in five (21%) are against and one in three (33%) are neither in favour nor against. Canadians' opinions were swayed when presented with statements of benefits and perceived drawbacks. A significant proportion of respondents would shift to a more favourable opinion, with the largest for improved food safety at 43%, and 32% for food spoilage. As expected, less positive statements would incline consumers to respond more negatively, including 60% who would have a less favourable response in the context of the statement that “the long term health effects of eating irradiated foods are unknown”.

Whether in favour or against, most prefer that irradiated foods be labeled (82%) and many would consider the purchase of irradiated foods if they were labeled (39%).

Genetic engineering was the most familiar new or advanced technology in food production with four in five (81%) Canadians having heard of it and half (52%) know something about it but are unlikely to purchase genetically engineered food (54%).

Men (20%) were more likely than women (12%) to purchase genetically engineered food, as were those from Saskatchewan (29%) and Alberta (23%) compared to Ontario (14%) and BC (14%). Those who were unlikely to purchase genetically engineered foods are concerned with potential long-term health effects (52%) and food safety (24%).

A quarter (25%) of Canadians know something about nanotechnology while just one in five (20%) of those would purchase products made using this technology due to the potential long-term health impacts (38%), safety (24%) and insufficient information about it (22%).

Men were more likely to be familiar (33%) and likely to buy (23%) food made using nanotechnology, as were those in the Western Provinces (26%) compared to Ontario (14%).

Animal biotechnology used in food production is familiar to half (49%) of Canadians but only one in five (21%) know something about it.

A quarter (25%) of those who know something about animal biotechnology would purchase food made using this technology. Those more likely to purchase these food products include men (31%), residents of the Western Provinces (29%) and young people (36%).

Most Canadians (62%) have never heard of high-pressure processing as a technology used in food production. Less than one in five (16%) Canadians have heard of it and know something about it, and less than half (28%) would go on to purchase food made using high-pressure processing.

Likelihood to purchase foods made using this method was highest in Alberta (40%).

4.4 Assurance Systems

Canadians are more likely to be confident in the accuracy of labelling of food items when it comes to locally produced (49%) and nutritional value (37%) but less confident in labelling of other attributes such as general health claims (15%) and animal welfare claims (14%).

Half of Canadians (49%) are confident in the Canadian food system’s management of concerns regarding animal diseases, down from three in five (59%) in 2010.

4.5 Communication

Canadians still rely on television and radio reports (43%) and newspapers (33%) to learn about food and nutrition issues.

Older Canadians are more likely to rely on television and radio (53%), while younger Canadians look to the internet (25%). Government websites (10%) and printed publications (10%) are used by one in ten Canadians as a resource to learn about food and nutrition issues.

Over half of Canadians indicated that they have avoided particular food items in the past because of food safety issues (58%) and recalls (55%) when grocery shopping. Just over a quarter (27%) have been say that over the past year their grocery purchase decisions have been influenced by food safety incidents or recalls.

5.0 Detailed Findings

5.1 Overall Food Safety and Quality

When asked what their overall impression of the quality of food produced in Canada, most feel that it is of good or excellent quality (85%).

Most Canadians feel that the quality of food produced in Canada is either good or excellent (85%)

Q8. What is your overall impression of the quality of food that is produced in Canada? Is it...
Base: All Respondents 2014 (n=3024)

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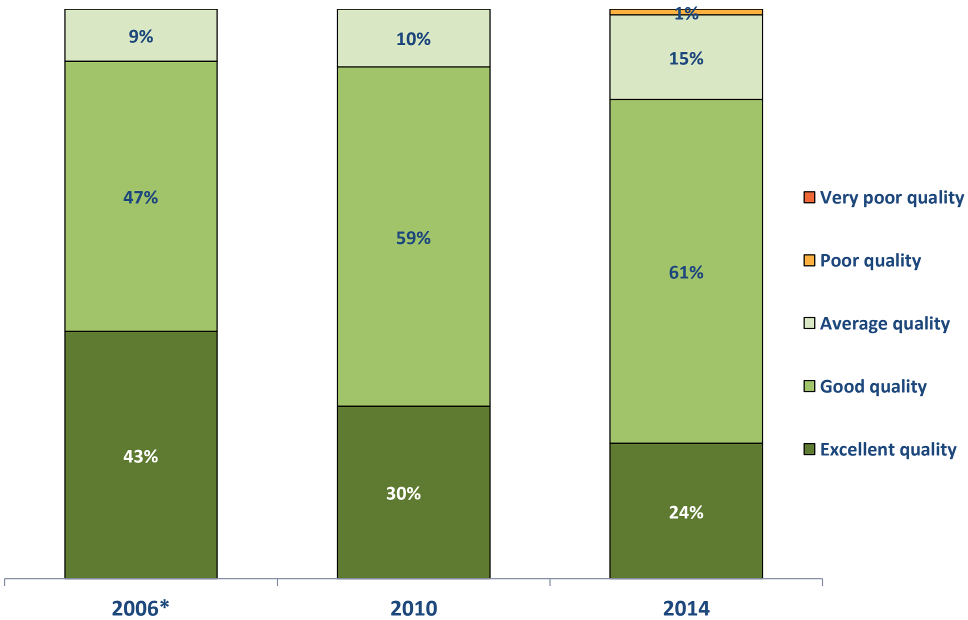
Those more likely to rate their impression as either **excellent or good quality** include:

- Respondents from Quebec (89%) and Ontario (85%) compared to Western Provinces (81%), and Atlantic Provinces (81%);
- Older respondents (55+: 88%; 45-54: 87%) compared to younger respondents (35-44: 81%; 18-34: 80%);
- Higher household income (100K or more; 88%) and middle income (20K to under 60K; 85%) compared to lower household income (under 20K; 81%);
- Language spoken at home French (90%) compared to English (83%) and other languages (76%);
- Seek food items that are locally produced (88%), environmentally responsibly produced (85%) compared to free range (83%) or organic (80%);
- In favour of irradiation (92%) compared to those against (78%); and
- Confident in food safety (97%) compared to those somewhat confident (75%) and those

who are unconfident (44%).

Canadians' perception of the quality of food produced in Canada has fallen slightly since the previous wave in 2010. While the majority of Canadians feel that food produced in Canada is either of excellent or good quality, the number who feel that the food produced in Canada is of average quality has increased from 10% in 2010 to 15% in 2014.

Canadians' overall impressions of the quality of food produced in Canada is down slightly from 2010, from 89% to 85%.



Q8. What is your overall impression of the quality of food that is produced in Canada? Is it...
Base: All Respondents 2014 (n=3024); 2010 (n=3144); 2006 (n=1600)* telephone only

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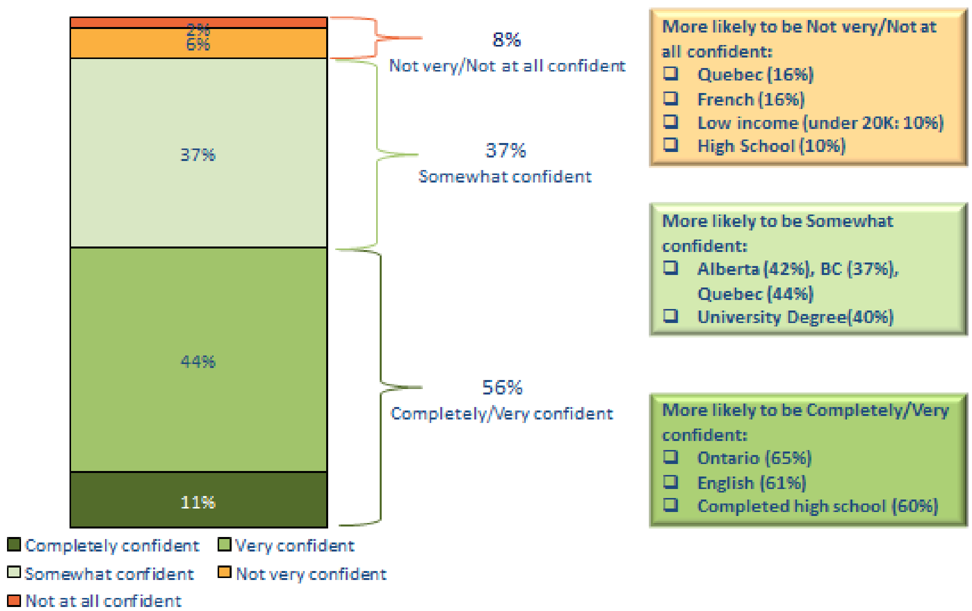
When asked whether they felt food produced in Canada is safe, almost three in five (57%) are completely or very confident that is it is safe.

Three in five Canadians (56%) are completely or very confident that food in Canada is safe

- It is interesting to note that those with a higher education are more likely to be somewhat confident in food safety, while those with a high school education are slightly more polarized, with statistically significantly higher number completely/very confident (60%) as well as more not very/not at all confident (10%)



Q9. How confident are you that food produced in Canada is safe? Are you…
Base: All Respondents 2014 (n=3024)

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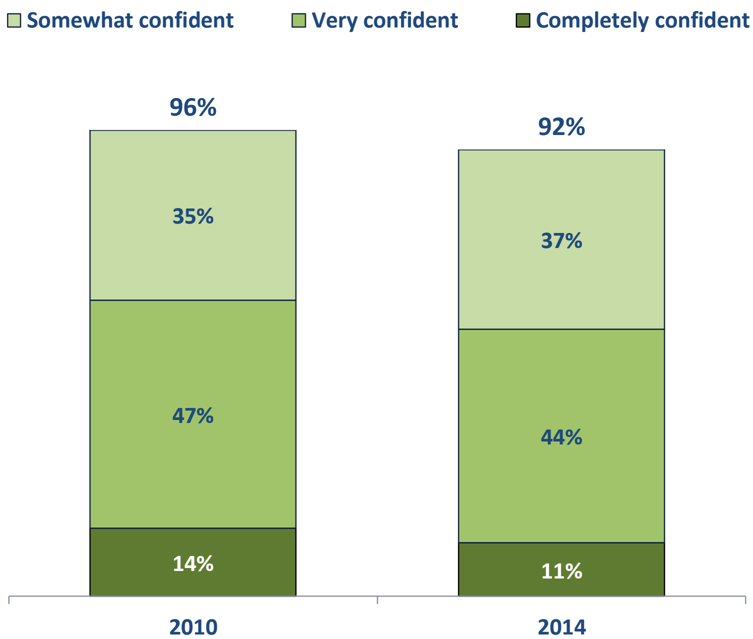
Those more likely to be **completely or very confident** include:

- Respondents from Ontario (65%), Atlantic Provinces (56%), and Western Provinces (56%), most notably Manitoba (61%), Saskatchewan (60%), compared to Quebec (41%);
- High school (60%) compared to University Degree (53%);
- English spoken at home (61%) and other languages (58%) compared to French (39%);
- Seek locally produced (58%), environmentally responsible production (54%) and free range (51%) compared to organic (47%);
- In favour of irradiation (67%) compared to those against it (43%); and
- Excellent/good (64%) impression of quality compared to average (13%) and poor/very poor (5%).

Canadians' confidence in the safety of food produced in Canada remains high; however, confidence appears to be softening with fewer indicating they are completely or very confident in 2014.

Canadians' confidence in the safety of food produced in Canada remains high in 2014, as it was in 2010



Q9. How confident are you that food produced in Canada is safe? Are you...
Base: All Respondents 2014 (n=3024); 2010 (n=3144)

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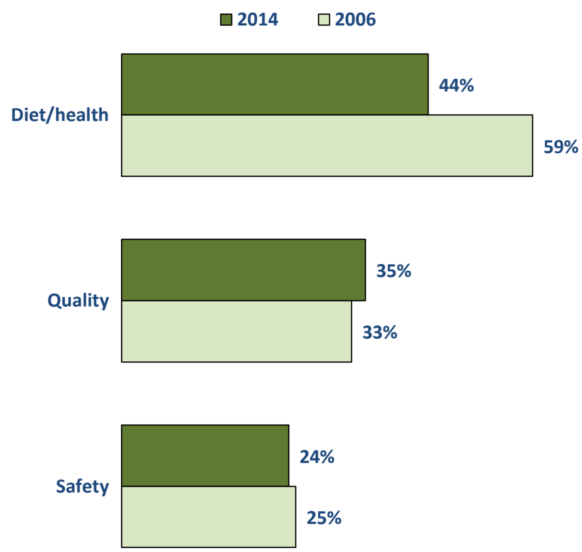
Canadians were asked if they have changed their food purchasing habits in the past year. Two in five (44%) have changed their food purchasing habits for diet or health reasons, one in three (35%) due to food quality and a quarter (24%) due to food safety.

In the past year, two in five (44%) have changed their food purchasing habits for health, one in three (35%) for quality and one in four (24%) for safety



Q22. In the past year have you changed your food purchasing habits regarding ….
Base: All Respondents 2014 (n=3024); 2006 (n=802)

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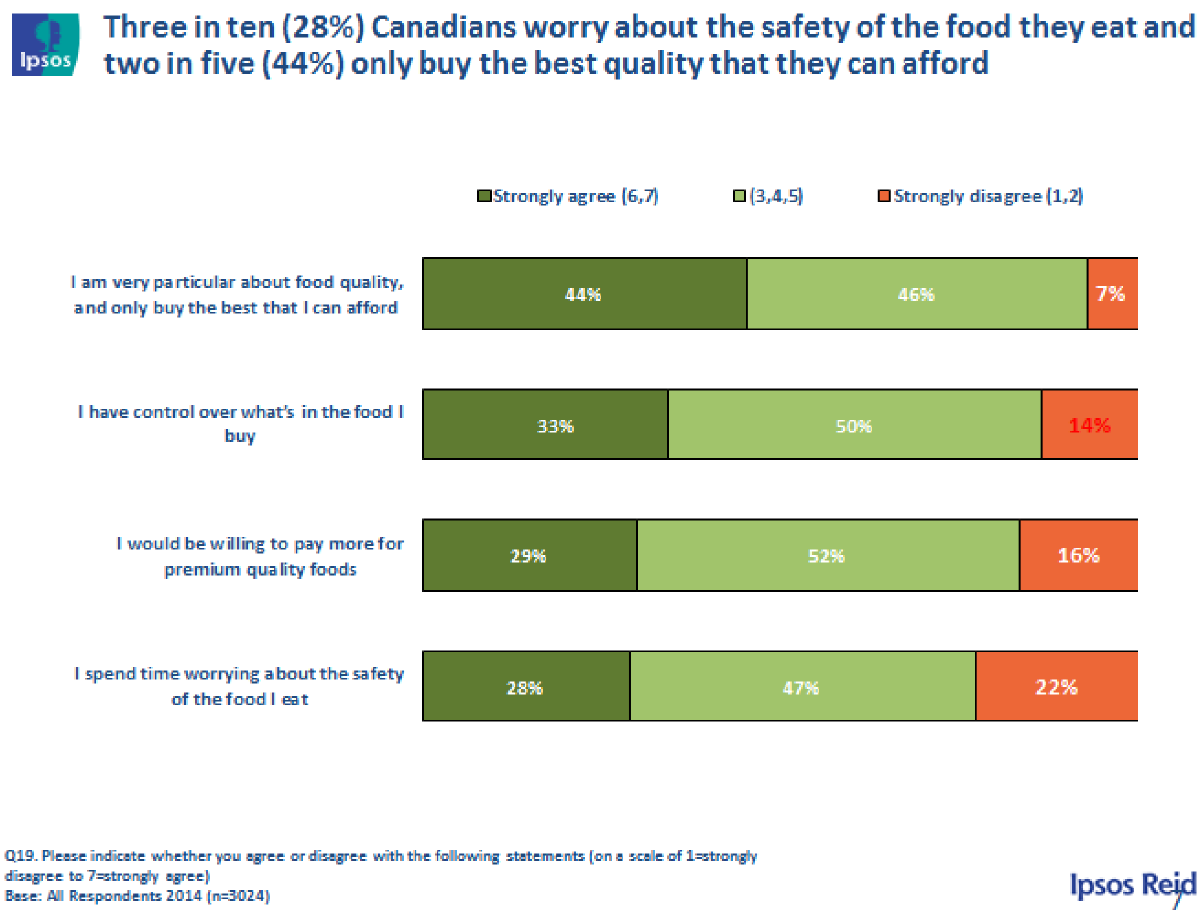
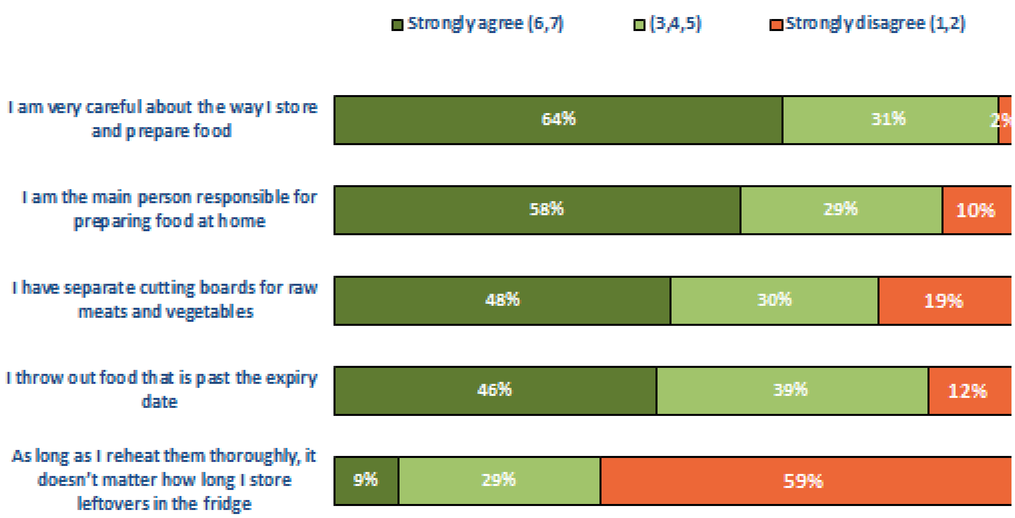
Two in five (44%) agree they are very particular about food quality and only buy the best they can afford. One in three (33%) Canadians feel they have control over what is in the food they buy and three in ten (29%) would be willing to pay more for premium quality foods. Three in ten (28%) Canadians spend time worrying about the safety of the food they eat.



When it comes to food safety practices, most Canadians (64%) feel they are very careful about the way they store and prepare food. However, only half have separate cutting boards for raw meat and vegetables (48%) or throw out food that is past the expiry date (46%).

Most Canadians (64%) feel that they are very careful about the way they store and prepare food



Q19. Please indicate whether you agree or disagree with the following statements (on a scale of 1=strongly disagree to 7=strongly agree)
Base: All Respondents 2014 (n=3024)

Ipsos Reid

Those more likely to be careful when storing or preparing food include:

- Women (68%) compared to men (59%);
- Residents from Atlantic Provinces (68%), Quebec (67%) and BC (64%) compared to Western Provinces (62%; especially Alberta: 60%; and Manitoba: 55%);
- Older respondents (75%) and middle aged respondents (45-54: 71%; 35-44: 59%) compared to younger respondents (47%);
- Completed college/apprenticeship (69%) and graduated high school (65%) compared to University Degree (59%);
- Live in a rural (73%) neighbourhood compared to urban (62%);
- Speak French (67%) at home compared to other languages (53%);
- Seek locally produced (74%) and environmentally responsible production (75%) of food items compared to organic (71%) and free range (70%);
- Excellent/good (66%) overall impression of food quality compared to average impressions (50%); and
- Confident (67%) in food safety compared to those who are somewhat confident (61%) and unconfident (57%).

Those more likely to throw out food past the expiry date include:

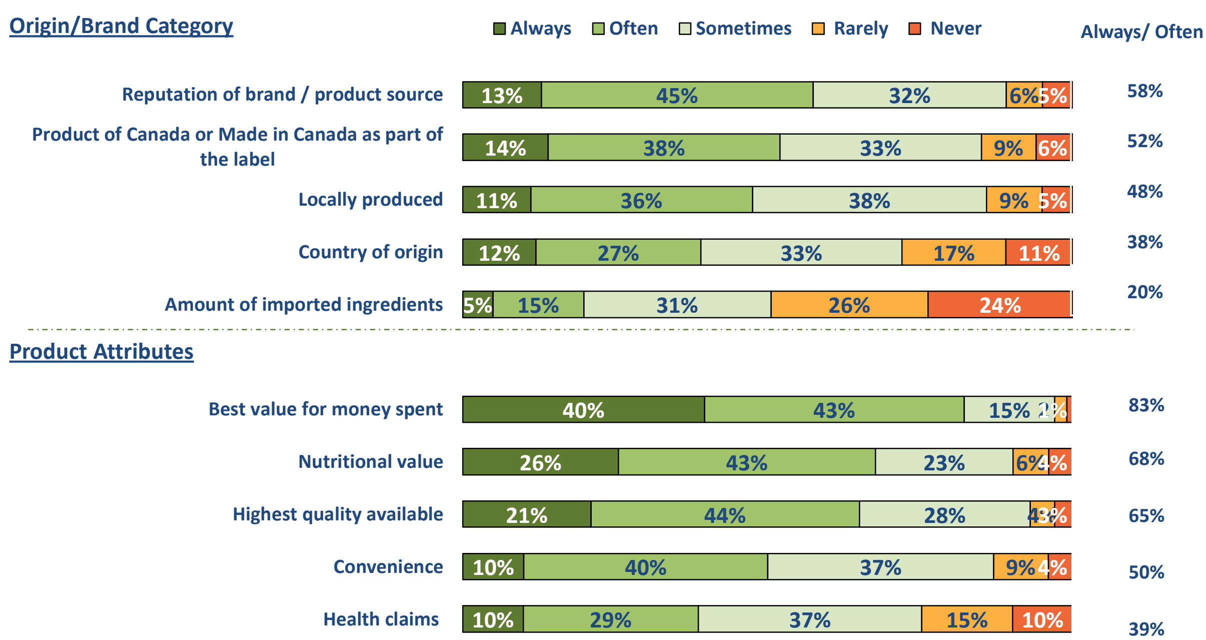
- Women (48%) compared to men (44%);

- Respondents from Alberta (51%) and Ontario (49%) compared to those from Quebec (40%);
- Middle aged respondents (35-44: 52%) compared to older respondents (55+: 42%);
- High school education (49%) and college/apprenticeship (49%) compared to university degree (43%);
- Higher household income $100K or more: 52%; 60K to under 100K: 48%) compared to lower income (20K to under 60K: 46%; under 20K: 40%);
- Speak English (49%) at home compared to French (40%) and other languages (36%);
- Have children in household (51%) compared to those who do not (45%);
- Seek organic (52%) food items compared to humane animal welfare (48%) and locally produced (46%);
- Poor/very poor (65%) overall impression of food quality compared to excellent/good (46%) and average (44%) impressions; and
- Confident (49%) and unconfident (50%) in food safety compared to those who are somewhat confident (41%).

5.2 Attribute Importance

Canadians were asked how frequently they look for specific attributes of foods when grocery shopping or dining away from home. Two in five (40%) Canadians always look for the best value for money spent, while one in four (26%) always look for nutritional value and one in five (21%) always look for the highest quality available. Other product specific attributes, product origin or brand attributes were among the top “looked for” characteristics when shopping or dining out. At least half of Canadians often or always look for brand reputation/product source (58%), whether it is a product of Canada (52%) or the convenience of the product (50%), while just under half look for locally produced items often or always (48%).

Canadians most look for value for money, nutritional value, quality and brand reputation when grocery shopping or dining out



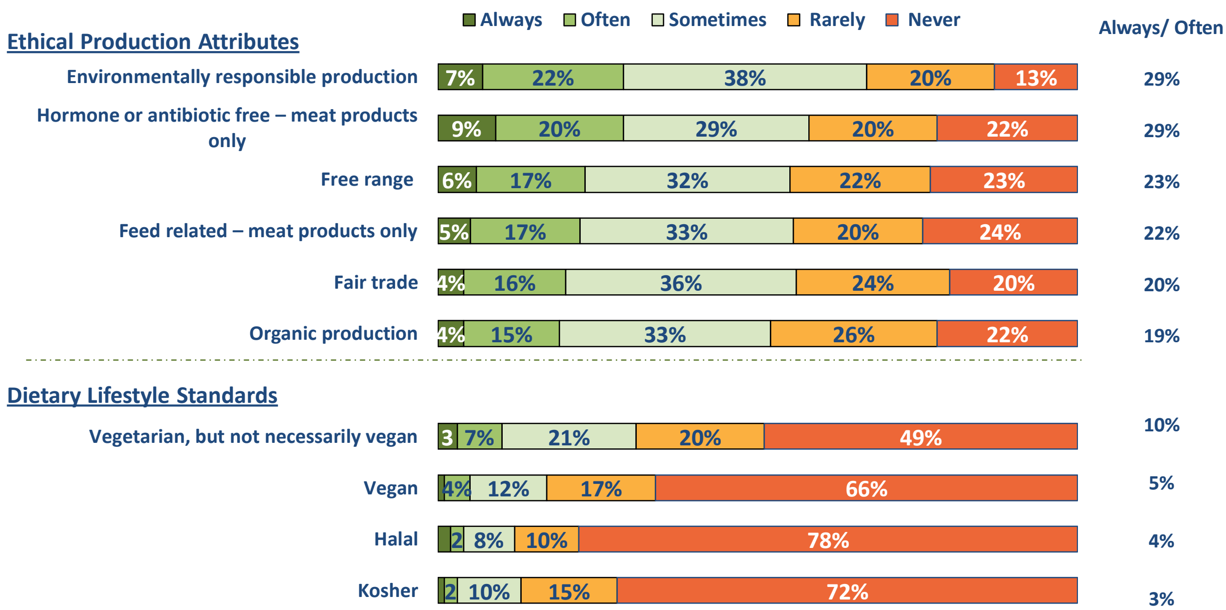
Q1. Listed below is a number of attributes which you may or may not look for when grocery shopping or dining away from home. Please indicate how frequently you seek food items with each attribute using the scale provided.
Base: All Respondents 2014 (n=3024)

Ipsos Reid

Interest in most product specific and brand attributes remained stable from the previous wave (not shown in above graphic). Reputation of brand fell from 71% of Canadians always or often looking for this attribute to 58% in 2014. A similar fall was experienced in locally produced items, from 58% in 2010 to 48% in 2014. Best value for money spent fell slightly from 87% always/often/sometimes in 2010 to 83% in 2014. Similarly highest quality available fell from 73% in 2010 to 68% in 2014.

Overall, ethical production attributes and dietary lifestyle standards were looked for often or always by less than three in ten Canadians. Environmentally responsible production (29%) and hormone or antibiotic free meat (29%) were top looked for ethical practices, while vegetarian friendly options (10%) was the highest sought out lifestyle standard.

Ethical production and lifestyle standards are not looked for by most Canadians when grocery shopping or dining out



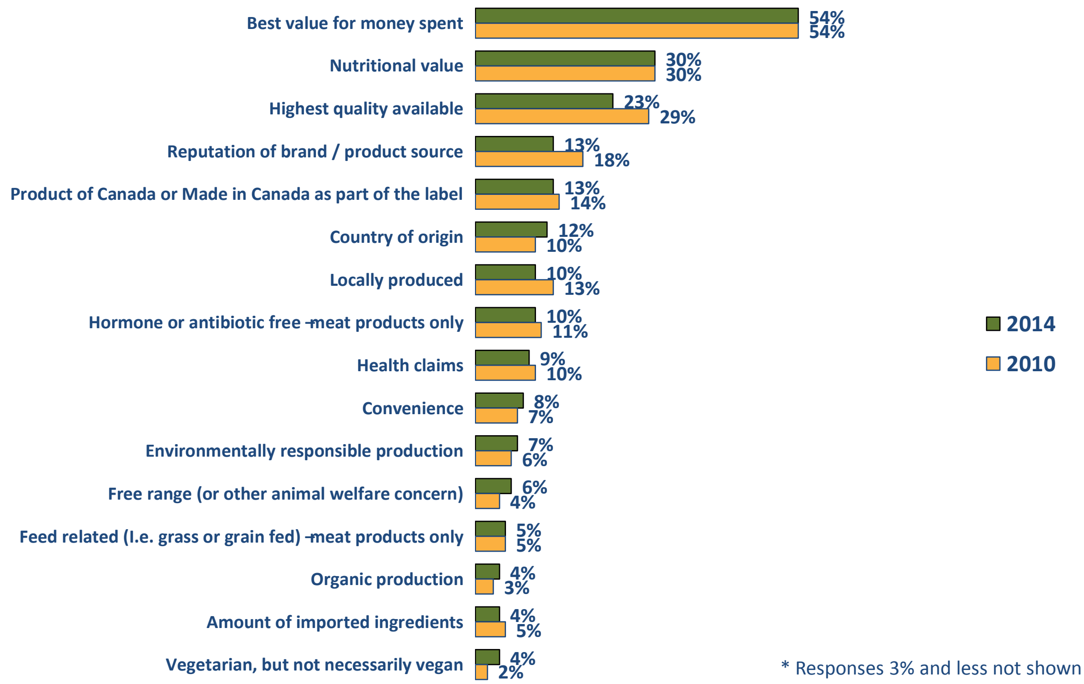
Q1. Listed below is a number of attributes which you may or may not look for when grocery shopping or dining away from home. Please indicate how frequently you seek food items with each attribute using the scale provided.
Base: All Respondents 2014 (n=3024)

Ipsos Reid

Canadians seek out ethical production and dietary lifestyle standards in similar numbers to the previous wave. Locally produced products, organic production, environmentally responsible production and free range products will be further discussed in more detail in their respective sections to follow.

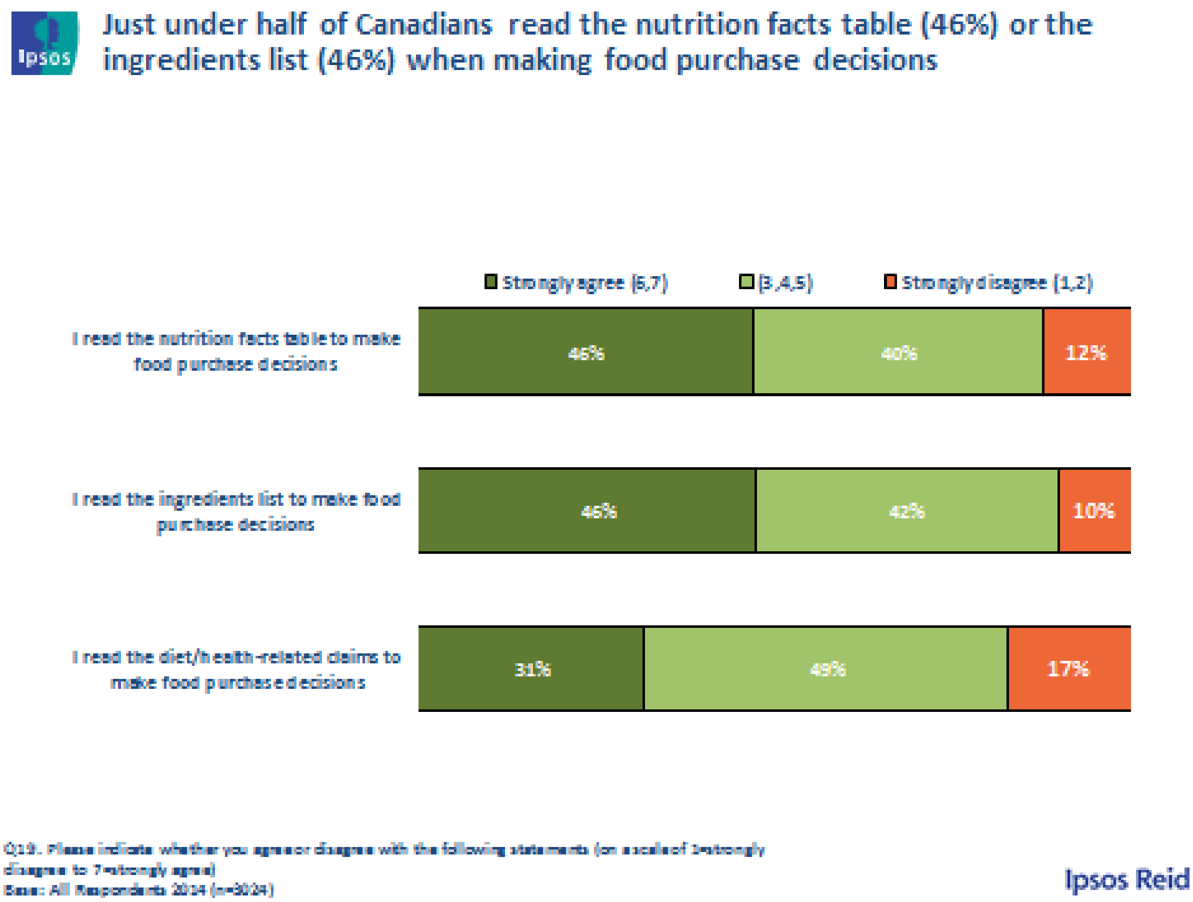
Over half of Canadians indicate “best value for money spent” is a deal breaking attribute when grocery shopping or dining away from home.

Best value for money spent (54%) and nutritional value (30%) continue to be the top deal breakers for Canadians when purchasing foods



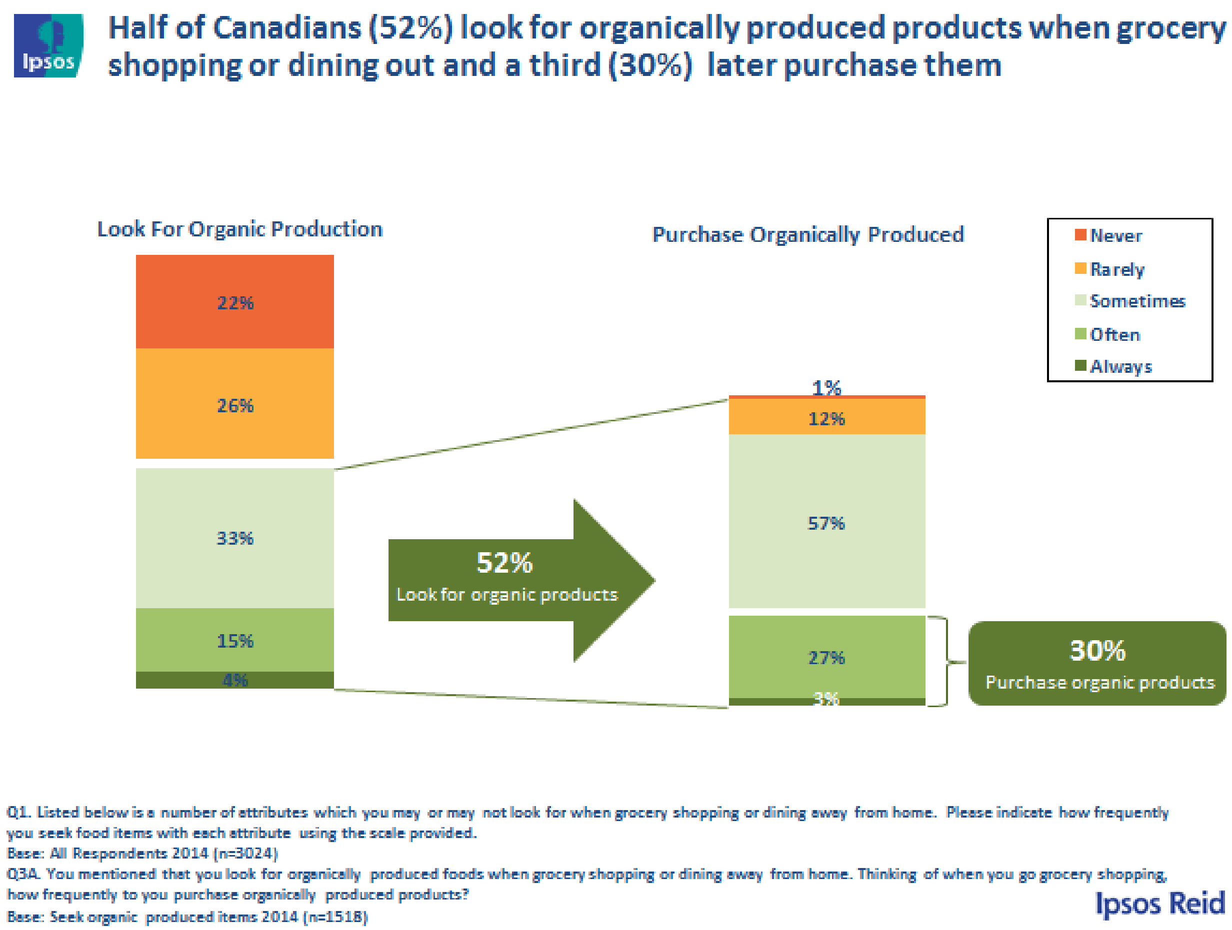
Q2. Listed below are the features you indicated that you “always” look for in food when grocery shopping or dining away from home. Please indicate which of those you consider to be “deal breakers” or features which absolutely must be present in the food products you purchase.
Base: Those who always seek food items when grocery shopping or dining away from home 2014 (n=1907)

When making food purchase decisions, just under half of Canadians read the nutrition facts table (46%) or the ingredients list (46%). Three in ten (31%) read the diet or health-related claims made about the food item when making a food purchase decision.



5.2.1 Organic Products

Half of Canadians (52%) at least sometimes seek out organically produced items in the grocery store or at a restaurant. Among those who do, 30% indicate they purchase these items often or always.



Those more likely to **seek** organic production of products **always or often** when grocery shopping include:

- Women (21%) compared to men (17%);
- Younger respondents (18-34: 24%, 35-44: 22%) compared to older respondents (45-54: 17%; 55+: 15%);
- Respondents from BC (27%), Atlantic Provinces (21%), Alberta (20%), Ontario (19%) and Quebec (17%) compared to Saskatchewan (13%) and Manitoba (9%);
- University degree (24%) compared to those with college/apprenticeship experience (17%), high school (15%) and none of these (14%);
- Live in urban areas (20%) compared to rural (14%);
- Against irradiation (33%) compared to in favour (16%); and
- Poor/very poor (41%) overall impression of quality compared to average impression (23%) and excellent/good impression (18%).

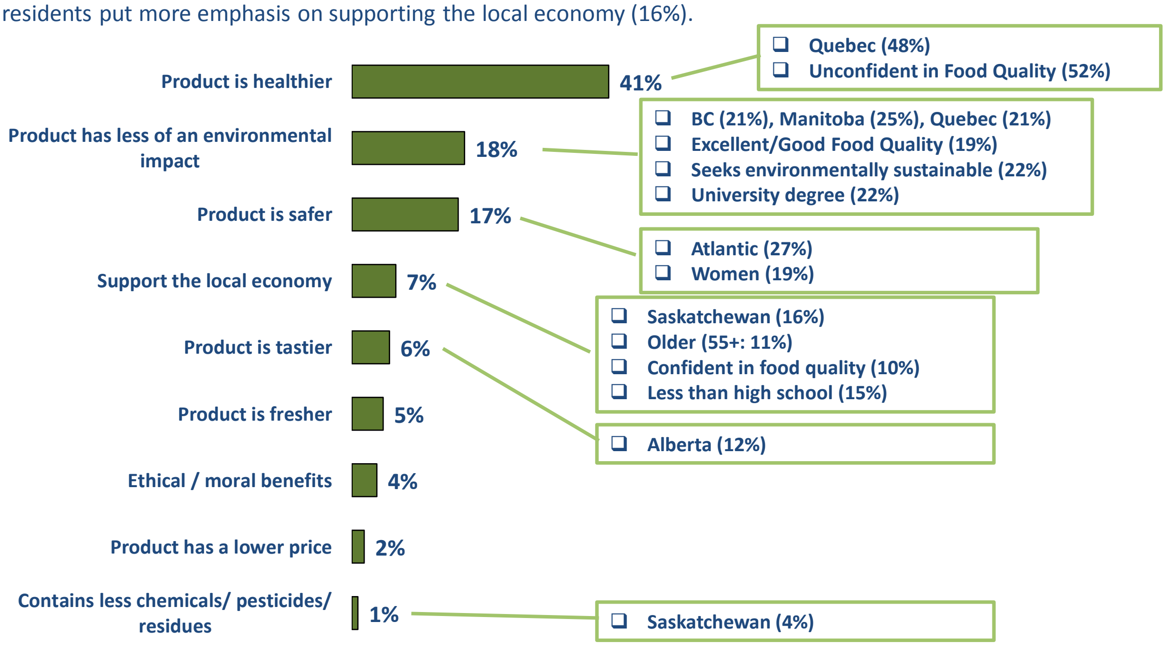
Those more likely to **purchase** organically produced products include:

- Respondents from BC (36%), Ontario (31%) compared to Manitoba (19%) and Quebec (24%);
- University degree (34%) compared to high school (23%);
- Seek foods that are organic (64%) and free range (51%) compared to locally produced (41%) and environmentally responsible production (45%); and
- Against irradiation (44%) compared to in favour (27%).

Those who purchase organic foods were asked what the most important benefit of organic foods is to them. Two in five (41%) of those who purchase felt that organically produced products are healthier, while one in five felt that the environmental impact (18%) or increased food safety (17%) were the most important reason.

Nationally, Canadians felt that the most important benefit of organic foods is that they are healthier (41%)

- However, there are regional differences in Canadians' attitudes towards benefits, Atlantic Canadians feel that organic products are safer (27%)
- BC (21%) and Manitoba (25%) residents feel that they had less of an environmental impact, while Saskatchewan residents put more emphasis on supporting the local economy (16%).



Q3B In your opinion what is the most important benefit of organic foods?
Base: Purchases organic produced items 2014 (n=1322)

Ipsos Reid

Those who are more likely to consider that **organic products are healthier** as the most important benefit of organic foods include:

- Respondents from Quebec (48%) compared to Atlantic Provinces (35%), Western Provinces (37%) and BC (36%);
- Speak French at home (49%) compared to English (38%);
- Seek foods that are organic (47%) compared to locally produced (41%), free range (40%) and environmentally responsible production (39%); and
- Unconfident (52%) in food safety compared to those who are confident (37%).

Those who are more likely to consider that **organic production has less of an environmental impact** as the most important benefit of organic foods include:

- Respondents from BC (21%), Manitoba (25%) and Quebec (21%) compared to Saskatchewan (8%) and Ontario (14%);
- University degree (22%) compared to college/apprenticeship (14%) and high school (12%);
- Do not have children in their household (19%) compared to those who do (12%);

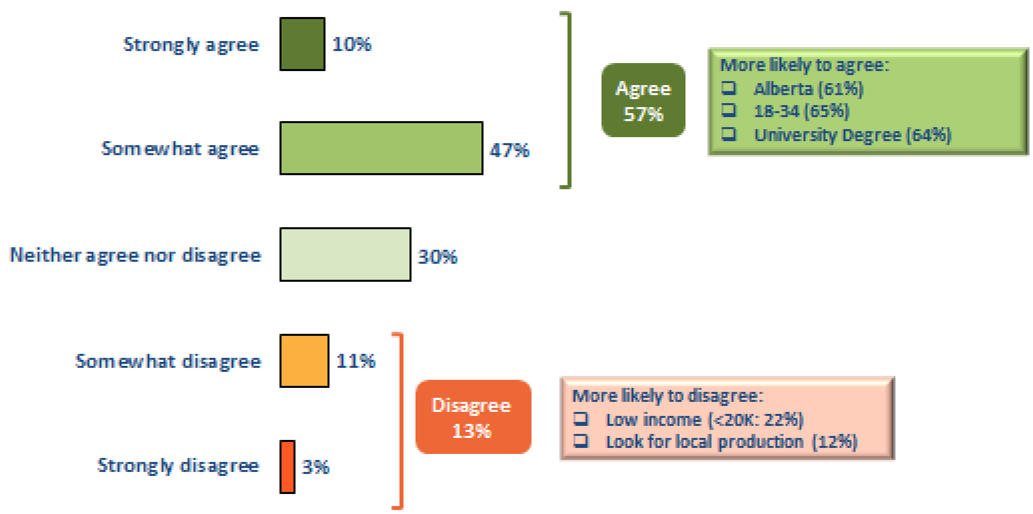
- Seek foods that have environmentally responsible production (22%) compared to locally produced (19%), free range (18%) and organic food items (17%); and
- Excellent/good (19%) impression of food quality compared to those who have the impression of it being average (12%).

Those who are more likely to consider the **product is safer** as the most important benefit of organic foods include:

- Women (19%) compared to men (14%);
- Respondents from Atlantic Provinces (27%), Ontario (20%), and Western Provinces (17%; especially Saskatchewan: 24%), compared to Quebec (8%);
- Speak English (20%) and other languages (17%) compared to French (7%);
- Do have children in household (23%) compared to those who do not (15%); and
- Seek foods that are free range (20%) compared to locally produced (17%), organic (16%) and environmentally responsibly produced (15%).

Purchasers of organically produced items were also asked if they were willing to pay more for these products. Three in five (57%) somewhat or strongly agreed they would be willing to pay more, while one in ten (13%) would not be willing to pay more for these products.

Three in five Canadians (57%) purchasing organic products are willing to pay more for products that are organically produced



Q3C. 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 organically produced"?
Base: Purchases organic produced items 2014 (n=1322)
*Please note numbering is rounded and may not add to 100%

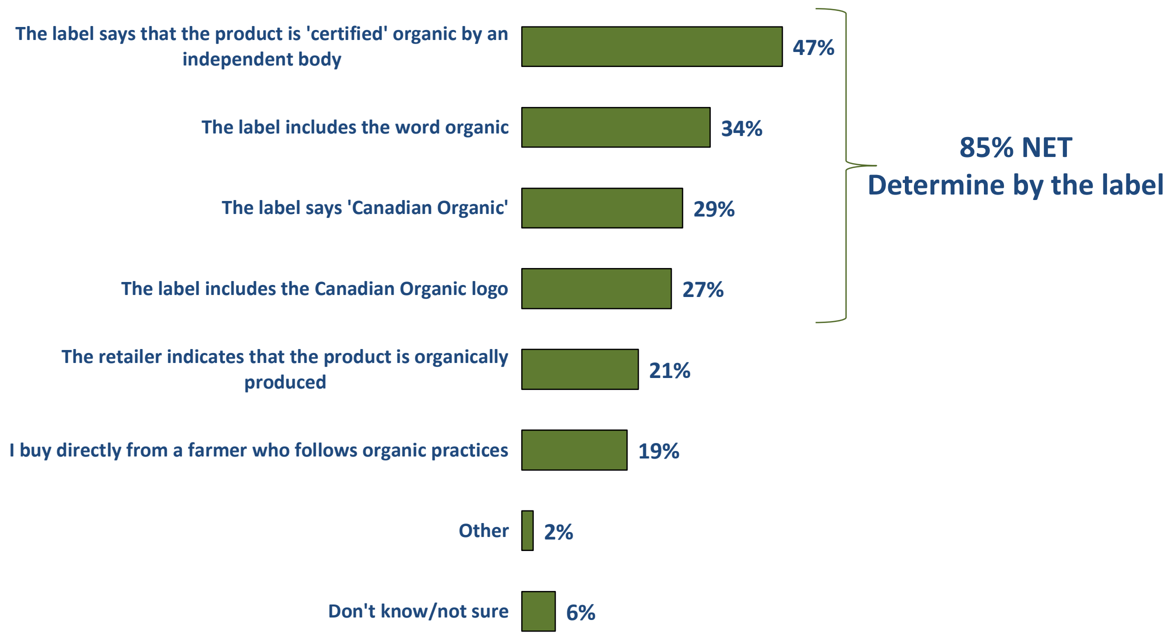
Ipsos Reid

Those who are more likely to **strongly or somewhat agree** that they are willing to pay more for organic food include:

- Respondents from Western Provinces (60%) and Ontario (59%) compared to Quebec (50%);
- Young respondents (18-34: 65%) compared to middle aged (35-44: 55%; 45-54: 53%) and older respondents (55+: 52%);
- University degree (64%) compared to college/apprenticeship (51%), high school (52%) and none of these degrees (47%);
- High household income (100K or more: 65%) and middle income (60K to under 100K: 63%; 20K to under 60K: 56%) compared to low (under 20K: 44%);
- Speak English at home (60%) compared to French (49%); and
- Seek organic food items (78%), free range (69%) and environmentally responsibly produced (65%) compared to locally produced (60%).

Purchasers of organic products were asked how they determine whether or not a particular product is organic. Almost half (47%) trust labels that indicate a product is 'certified' organic by an independent body, while one in three (34%) trust that food is organic based on the label including the word "organic".

Half of Canadians purchasing organic products (47%) determine the attributes based on the label stating that it is 'certified' organic

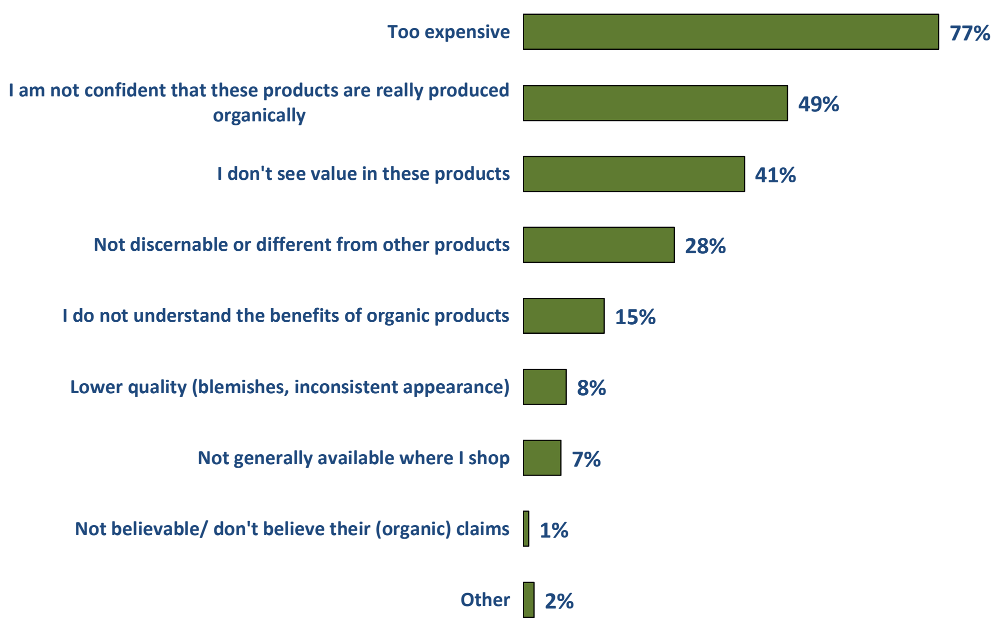


Q3D. How do you determine whether a particular product is "organic" or not?
Base: Purchases organic produced items 2014 (n=1322)

Ipsos Reid

Those who do not look for, or purchase, organically produced items were asked what their main reasons were for not purchasing these items. Almost four in five (77%) feel they are too expensive, while half (49%) were not confident these products were actually organically produced. Two in five (41%) do not see value in organically produced products.

Of those not purchasing organic products, most (77%) feel that they are too expensive, while half are not confident that they are what they claim (49%)



Q3E. What are your main reasons for not purchasing food products labelled as "organic"?
Base: Does not purchase organic produced items 2014 (n=1702)

Ipsos Reid

Those who are more likely to indicate that organic food is **too expensive** as their reason for not purchasing organic labelled food products include:

- Respondents from Alberta (82%) and BC (81%) compared to Ontario (73%);
- Household income of under 20K (78%) and 20K to under 60K (79%) compared to 100K or more (69%);
- Seek locally produced food items (78%) compared to free range (71%) and environmentally responsible production of food items (72%); and
- Have an excellent/good (78%) overall impression of quality compared to an average impression (70%).

Those who are more likely to indicate that they are **not confident that these products are actually organically produced** as their reason for not purchasing organic labelled food products include:

- Older respondents (55+: 58%, 45-54:49%) compared to younger respondents (18-34: 40%, 35-44: 41%);
- Middle income respondents (20K to under 60 K: 50%, 60K to under 100K: 54%) compared to lower income respondents (Under 20K: 40%);
- Live in rural areas (58%) compared to urban (48%); and

- Respondents who are unconfident (65%) and somewhat confident (54%) in food safety compared to those who are confident (45%).

Those who are more likely to indicate they **don't see value in these products** as a reason for not purchasing organic labelled food products include:

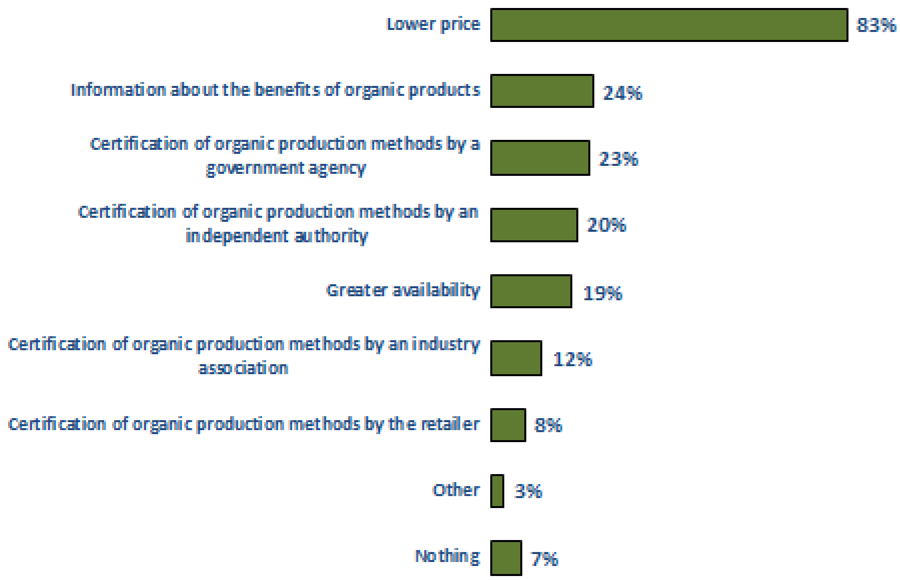
- Men (48%) compared to women (34%);
- Respondents from Ontario (43%) and Western Provinces (44%) compared to Atlantic Provinces (33%);
- Older respondents (55+: 47%) compared to younger respondents (18-34: 37%; 35-44: 36%);
- High household income (100K or more: 53%) compared to middle (60K to under 100K: 43%); 20K to under 60K: 40%) and low income (under 20K: 35%);
- In favour of irradiation (47%) compared to those against (32%); and
- Confident (45%) in food safety compared to those who are somewhat confident (35%).

Those who are more likely to indicate that organic food is **not discernable or different from other products** as a reason for not purchasing organic labelled food products include:

- Men (31%) compared to women (26%);
- Older respondents (45-54: 32%; 55+: 34%) compared to younger respondents (35-44: 22%, 18-34 19%);
- University degree (34%) compared to high school (24%) and none (18%);
- Household income of 100K or more (30%), 60K to under 100K (30%) and 20K to under 60K (28%) compared to under 20K (20%);
- Have no children in the household (29%) compared to those that do (23%); and
- Excellent/Good (29%) overall impression of quality of food compared to average impression (21%).

When asked what would motivate them to purchase organically produced food, lower price (83%) was by far the top motivator. One in four consumers indicate that they could be motivated by more information regarding the benefits of organic production (24%) or certification of organic production methods by a government agency (23%). One in five (20%) indicate that certification by an independent authority would be a motivator.

Four in five (83%) would be motivated to purchase organically produced foods by lower prices

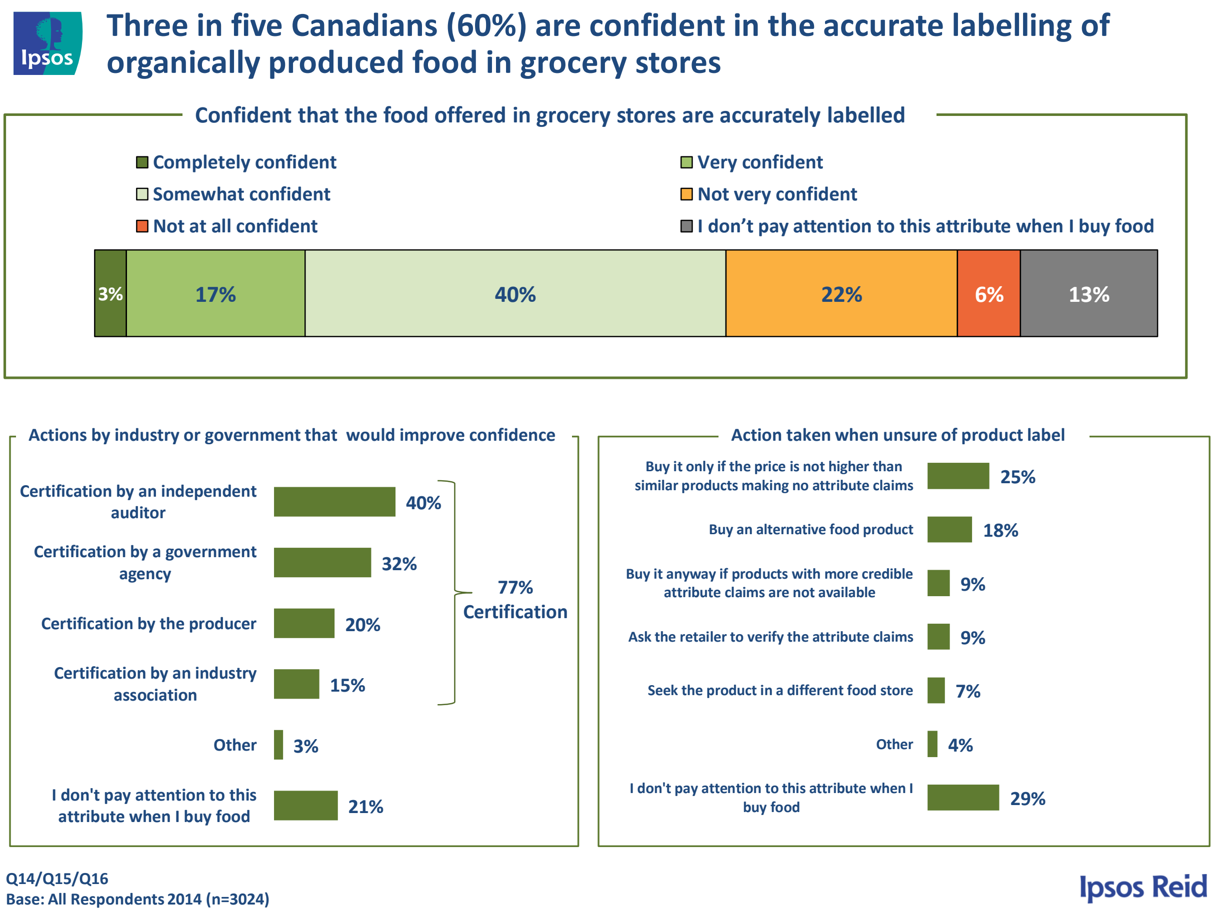


Q3F. Would any of the following measures motivate you to purchase more organically-produced food products?
Base: Does not purchase organic produced items 2014 (n=1702)

Ipsos Reid

When it comes to labelling of organically produced foods in grocery stores, three in five Canadians (60%) are completely, very or somewhat confident that they are accurately labelled.

Among those who are not confident in organic food labelling, one in four (25%) said they would only buy organically produced products if the price was equal to similar products not making these claims. When asked how confidence in organic production might be improved, most Canadians feel that certification of some sort would improve confidence (77%), with certification by an independent auditor (40%) or a government agency (32%) as the top sources.



Those more likely to be **completely/very confident** in labelling of organically produced foods in grocery stores include:

- Young respondents (18-34: 26%) compared to middle aged (35-44:20%, 45-54:19%) and older respondents (55+: 16%);
- Have children in household (26%) compared to those who do not (19%);
- Seek organic foods (41%) compared to free range (32%), environmentally responsible production of food items (32%) and locally produced (26%); and
- Confident in food safety (25%) compared to somewhat confident (13%).

Those more likely to feel **certification in general** would improve confidence in organically produced foods include:

- Women (80%) compared to men (74%);
- Respondents from Quebec (79%), Atlantic Provinces (79%) and Ontario (77%) compared to Manitoba (68%);
- University degree (82%) compared to college/apprenticeship (75%), high school (75%) and none of these (69%); and
- Middle income (20K to under 60 K; 79%, 60K to under 100K; 79%) compared to low income (Under 20K; 72%).

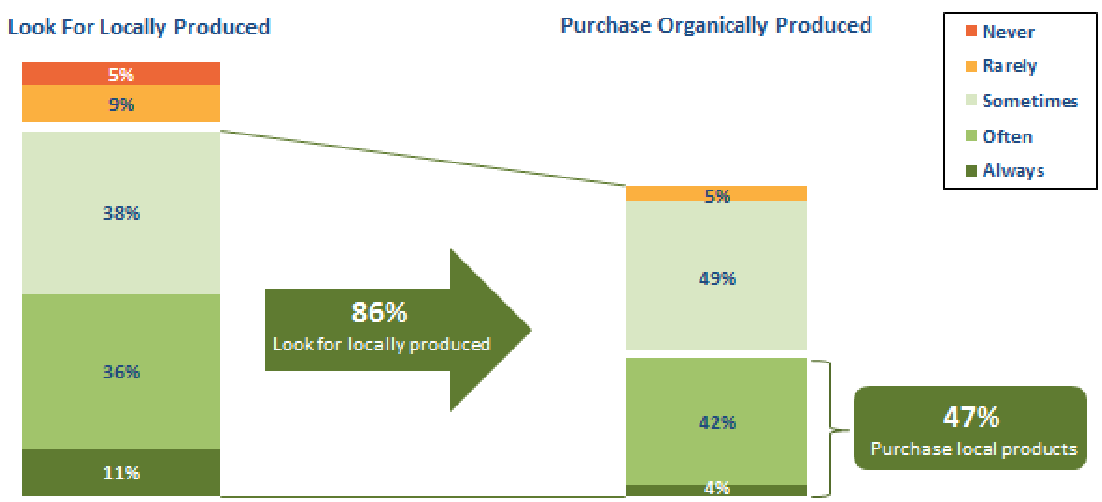
Those more likely to feel **certification by an independent auditor** would improve confidence in organically produced foods include:

- Young respondents (18-34: 44%; 35-44: 42%) compared to older respondents (55+: 36%);
- A university degree (47%) compared to college/apprenticeship (39%), high school (35%) and none (26%);
- Upper middle household income (60K to under 100K: 44%) compared to low income (under 20K: 36%);
- Seek organic (58%) and free range foods (54%) compared to locally (46%) and environmentally responsibly produced (50%);
- Against irradiation (54%) compared to those in favour (34%); and
- Somewhat confident (46%) and unconfident (45%) in food safety compared to confident (36%).

5.2.2 Locally Produced Products

The majority of Canadians (86%) seek out locally produced foods when grocery shopping. Among those who do, 47% indicate they often or always purchase local products.

Majority (86%) of Canadians look for locally produced food items when grocery shopping or dining out and almost half (47%) later purchase them



Q1. 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 2014 (n=3024)
Q4A. You mentioned that you look for locally produced foods when grocery shopping or dining away from home. Thinking of when you go grocery shopping, how frequently to you purchase locally produced products?
Base: Seek locally produced items 2014 (n=2594)
*Please note: numbering is rounded and may not add to 100%

Ipsos Reid

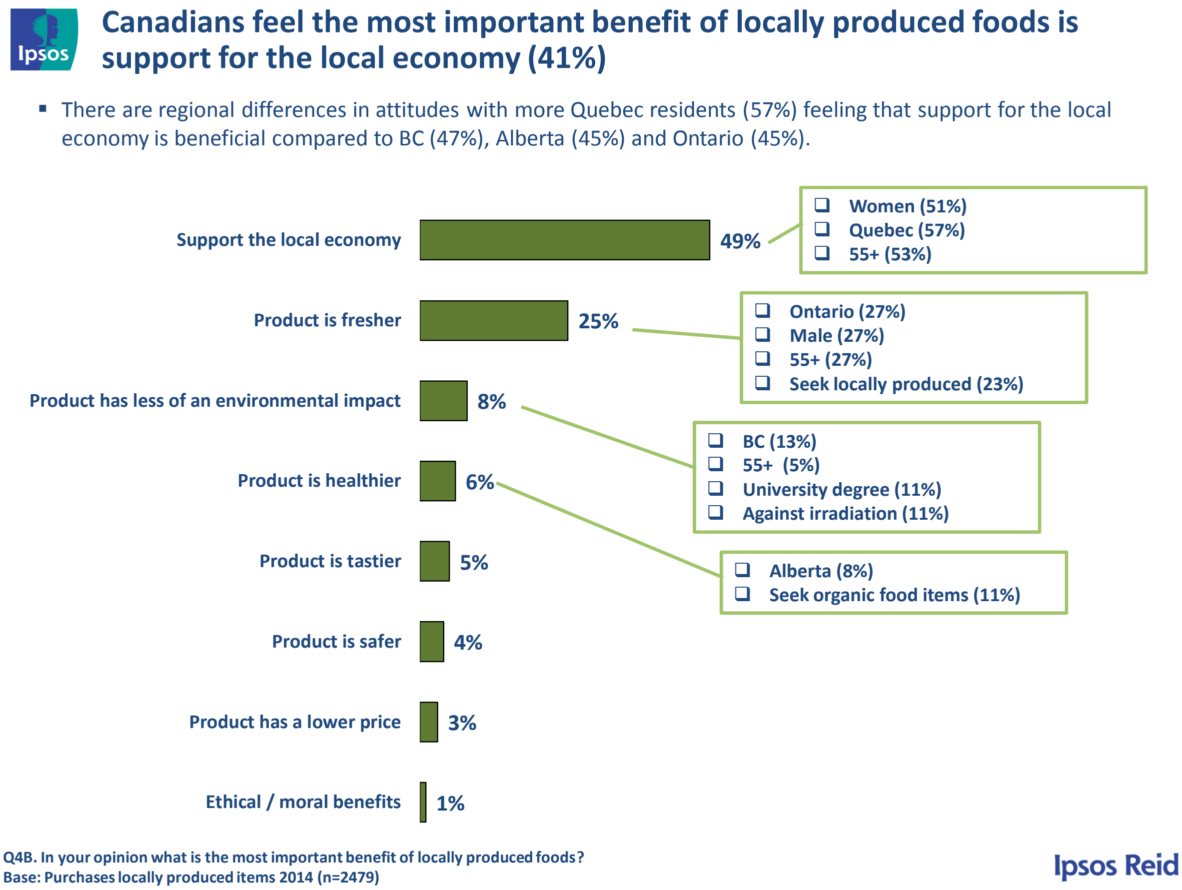
Those more likely to **seek locally produced** products when grocery shopping include:

- Women (53%) compared to men (43%);
- Older respondents (55+: 59%) compared to middle-aged (45-54: 48%, 35-44: 41%) young respondents (18-34: 38%);
- Respondents from BC (53%), the Atlantic Provinces (53%), Ontario (50%) and Quebec (47%) compared to those from Alberta (39%) and Manitoba (34%);
- Have an excellent/good overall impression of food quality (50%) compared to poor/very poor (48%) and average (35%);
- Confident (50%) in food safety compared to somewhat (44%);
- Reside in rural (55%) neighbourhoods compared to urban (47%);
- Lower middle household income (20K to under 60K: 51%) compared to higher income (60K to under 100K: 46%; 100K or more: 44%) and low income (under 20K: 44%); and
- Against irradiation (62%) compared to those in favour (46%).

Those who are more likely to purchase locally produced products **always or often** include:

- Respondents from Atlantic Provinces (52%), Quebec (51%), Ontario (48%), BC (46%) and compared to Alberta (35%), Saskatchewan (38%) and Manitoba (33%);
- Older respondents (55+: 57%) and middle-aged (45-54: 46%; 35-44: 44%) compared to young respondents (35%);
- Have a high school education (51%) compared to those with none (40%);
- Seek locally produced (69%) food items compared to environmentally responsible (65%) and free range (63%);
- Against irradiation (57%) compare to those in favour (49%);
- Have an excellent/good overall impression of the quality of food (49%) compared to those with an average impression (35%); and
- Confident (50%) in food safety compared to those who are somewhat confident (41%).

Those who purchase local foods were asked what they find to be the most important benefit of such foods. Half (49%) indicating the most important reason was supporting the local economy, while one in four (25%) perceive local products to be fresher and one in ten (8%) feel local foods have less of an environmental impact.



Those more likely to find **supporting the local economy** as the most important benefit of purchasing locally produced food include:

- Women (51%) compared to men (47%);
- Respondents from Quebec (57%) and Atlantic Provinces (54%) compared to Western Provinces (48%), BC (47%), and Ontario (45%);
- Older respondents (55+: 53%) compared to younger respondents (18-34: 44%; 35-44: 47%);
- Middle income (20K to under 60K; 52%) compared to low (under 20K; 44%);
- Reside in a rural (56%) neighbourhood compared to urban (48%);
- Speak French (57%) at home compared to English (47%) and other languages (35%); and
- Seek locally produced food items (50%), environmentally responsible production (49%) and free range (45%) compared to organic (41%).

Those more likely to find **product is fresher** as the most important benefit of purchasing locally produced food include:

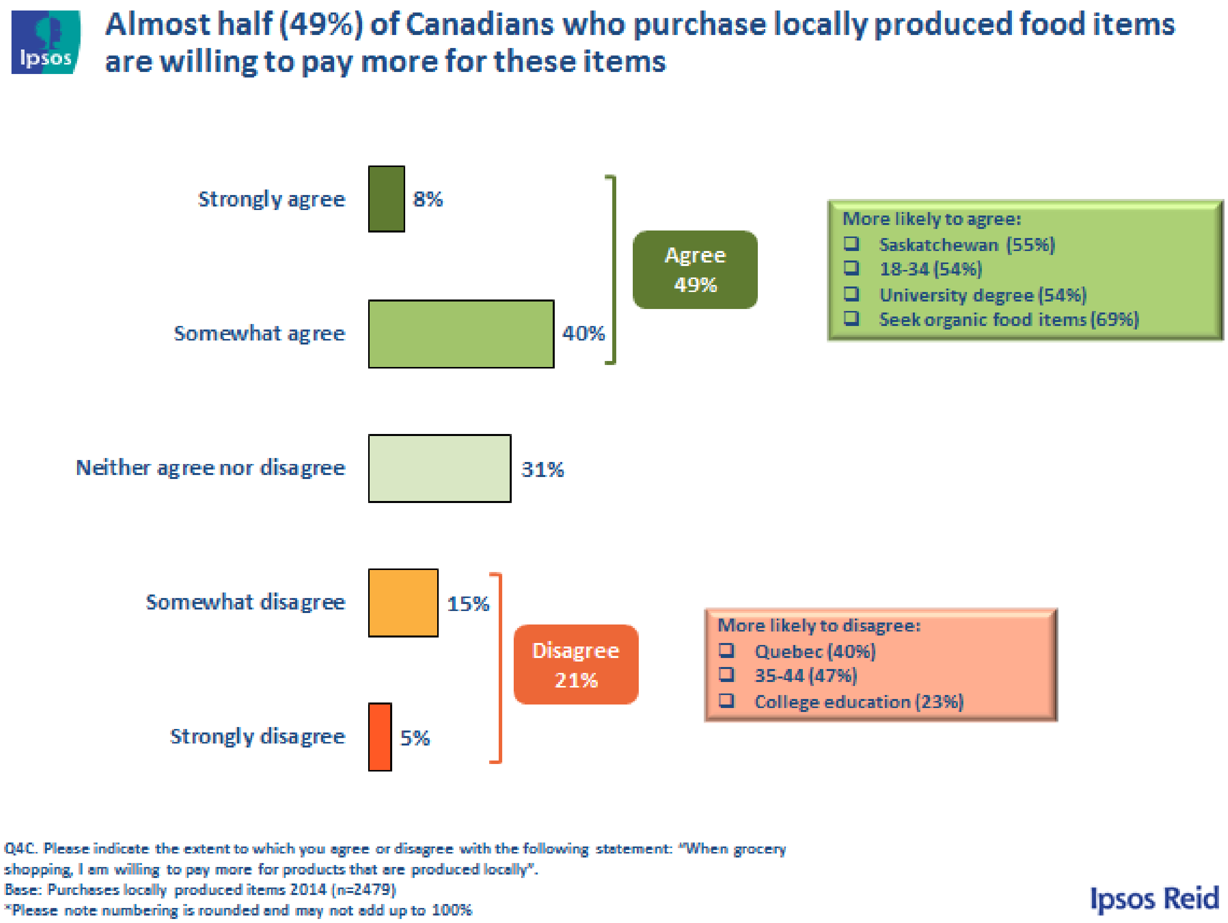
- Men (27%) compared to women (22%);
- Respondents from Ontario (27%) compared to Atlantic Provinces (20%);
- Older respondents (55+: 27%) compared to younger (21%);

- High school (28%) education compared to those with a university degree (23%);
- Higher income (60K to under 100K; 27%) compared to lower (20K to under 60K: 22%); and
- Seek locally produced (23%) compared to environmentally responsible production (20%), free range (20%) and organic (19%).

Those more likely to find **product has less of an environmental impact** as the most important benefit of purchasing locally produced food include:

- Respondents from BC (13%) and Western Provinces (11%) compared to Ontario (6%), Quebec (8%) and Atlantic Provinces (7%);
- Young respondents (18-34: 11%) and middle aged (35-44: 10%; 45-54: 10%) compared to older respondents (55+: 5%);
- University degree (11%) compared to college (7%), high school (7%) and none of these (4%);
- Seek organic (15%) and free range (13%) compared to environmentally responsible production (12%) and locally produced (10%);
- Against irradiation (11%) compared to those in favour (5%); and
- Unconfident (16%) and somewhat confident (9%) in food safety compared to those who are confident (7%).

Purchasers of locally produced items were also asked if they were willing to pay more for these products. Half (49%) somewhat or strongly agreed they would be willing to pay more, while one in five (21%) would not be willing to pay more for these products.

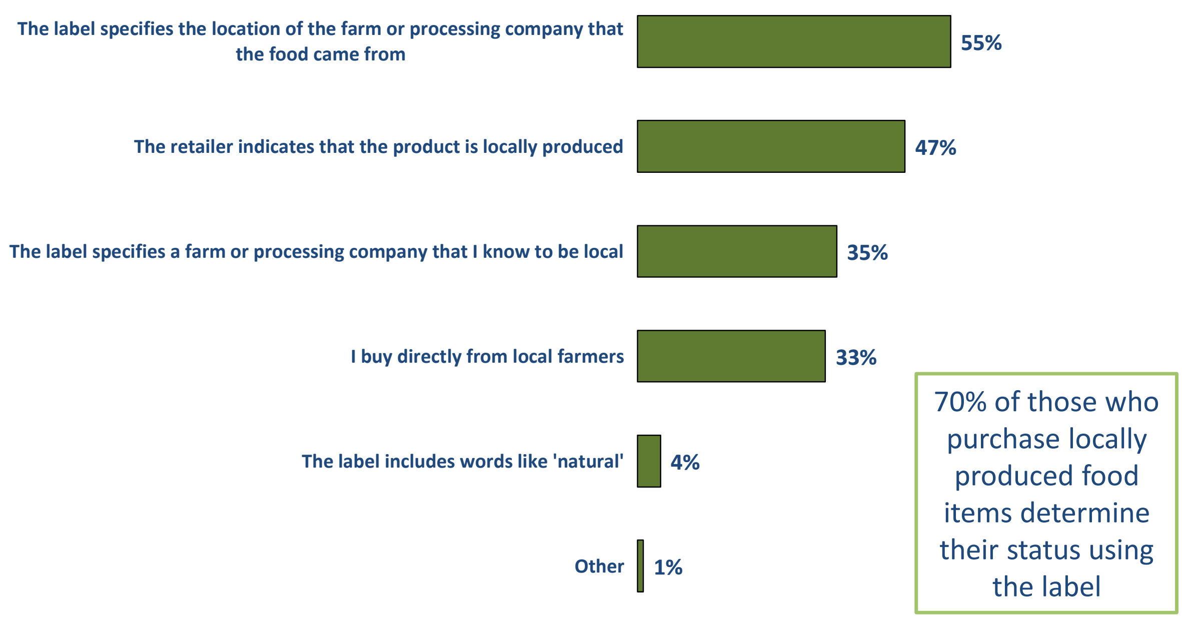


Those who are more likely to **strongly or somewhat agree** with paying more for locally produced products include:

- Respondents from BC (51%), Ontario (51%), Atlantic Provinces (55%) and Western Provinces (51%; especially Saskatchewan: 55%) compared to Quebec (40%);
- Young respondents (18-34: 54%) compared to middle-aged (35-44: 47%; 45-54: 43%);
- University degree (54%) compared to college/apprenticeship (46%), high school (46%) and none of these (41%);
- Higher income (60K to under 100K: 53%; 100K or more: 55%) compared to low (under 20K: 41%);
- Speak English at home (52%) compared to French (40%) and other languages (30%);
- Those who also look for organic food items (69%), environmentally responsible production (64%) and free range (64%) compared to those who purchase locally produced foods overall (58%);
- Excellent/good (50%) impression of the quality of food items compared to those with an impression of average quality (38%); and
- Confident in food safety (51%) compared to those who are somewhat confident (45%).

Purchasers of locally produced products were asked how they determine whether or not a particular product is local. Just over half (55%) trust the location of production or processing included on product labels while just less than half (47%) trust retailer claims that a product is locally produced. Similarly, three in ten are able to determine the product is local if the label specifies a farm or processing company known to be local (35%) or because they are purchasing directly from local farmers (33%).

Half (55%) of Canadians purchasing local food items determine the attributes based on the label identifying farm or company that the food came from

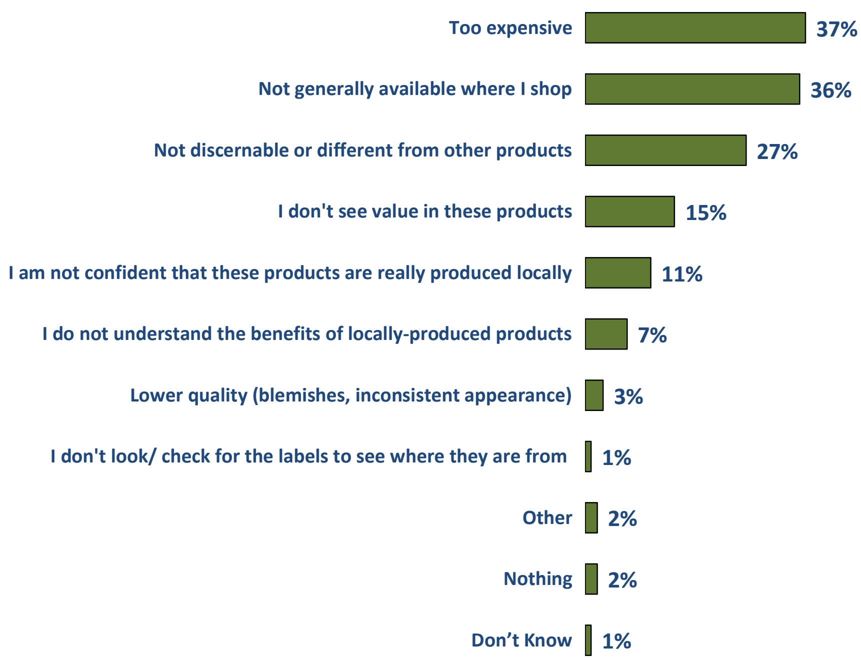


Q4D. How do you determine whether a particular product is locally produced or not?
Base: Purchases locally produced items 2014 (n=2479)

Ipsos Reid

Those who did not look for locally produced items were asked to indicate their main reason for not purchasing such foods. Almost two in five (37%) feel that the items are too expensive. One in three (36%) feel that such products are not available where they shop and three in ten (27%) couldn't discern local products from other products.

Of those not purchasing local food items, almost two in five feel that they are too expensive (37%) or they are not available where they shop (36%)



Q4E. What are your main reasons for not purchasing products labelled as "local"?
Base: Does not purchase locally produced items 2014 (n=545)

Ipsos Reid

Those who are more likely to reason **too expensive** for not purchasing local products include:

- Residents from Atlantic Provinces (56%), Alberta (46%) and Quebec (41%) compared to Manitoba (30%) and Ontario (28%);
- Young respondents (18-34: 47%) compared to middle aged (35-44: 26%) and older respondents (55+: 31%); and
- Unconfident in food safety (55%) compared to those who are confident (32%).

Those who are more likely to reason **not generally available where I shop** for not purchasing local products include:

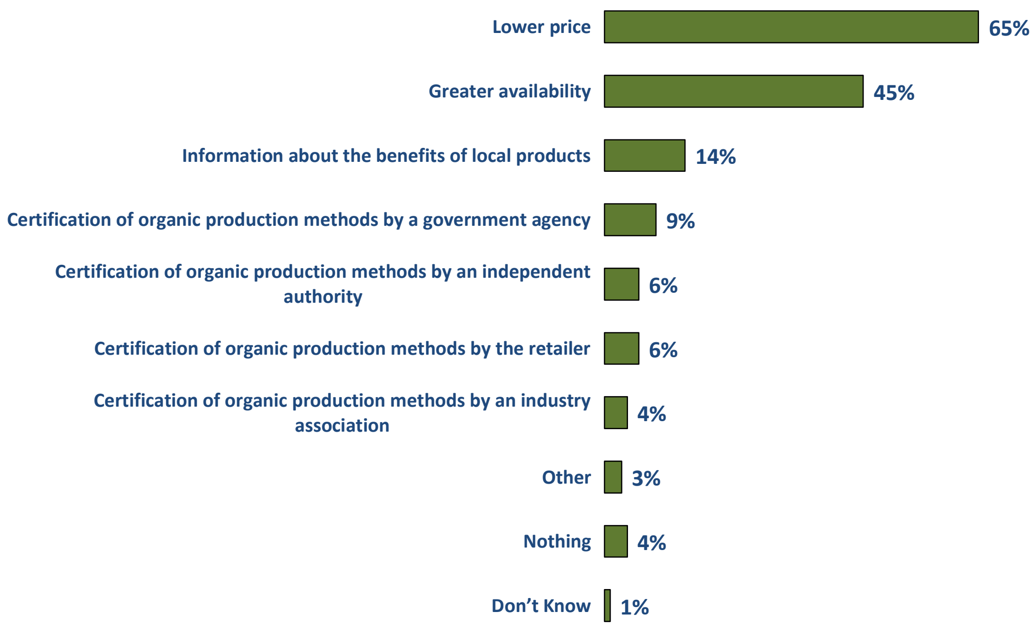
- Women (41%) compared to men (32%);
- Respondents from Western Provinces (46%) compared to Ontario (31%) and Quebec (28%);
- Reside in a rural neighbourhood (61%) compared to urban (33%); and
- Excellent/good (38%) overall impression of food quality compared to those who have an impression of it being average (27%).

Those who are more likely to reason **not discernable or different from other products** for not purchasing local products include:

- Ontario (30%) and Western Provinces (29%) compared to Atlantic Provinces (13%);
- Older respondents (55+: 35%) compared to middle-aged (45-54: 21%);
- University degree (33%) compared to college/apprenticeship (20%); and
- Excellent/good (30%) overall impression of food quality compared to those who have an impression of it being average (19%).

When asked what would motivate them to purchase locally produced food, two-thirds (65%) of consumers would be motivated by lower price while almost half (45%) might be motivated by greater availability.

Three in five (65%) would be motivated to purchase locally produced food items by lower price, while two in five would be motivated by availability (45%)



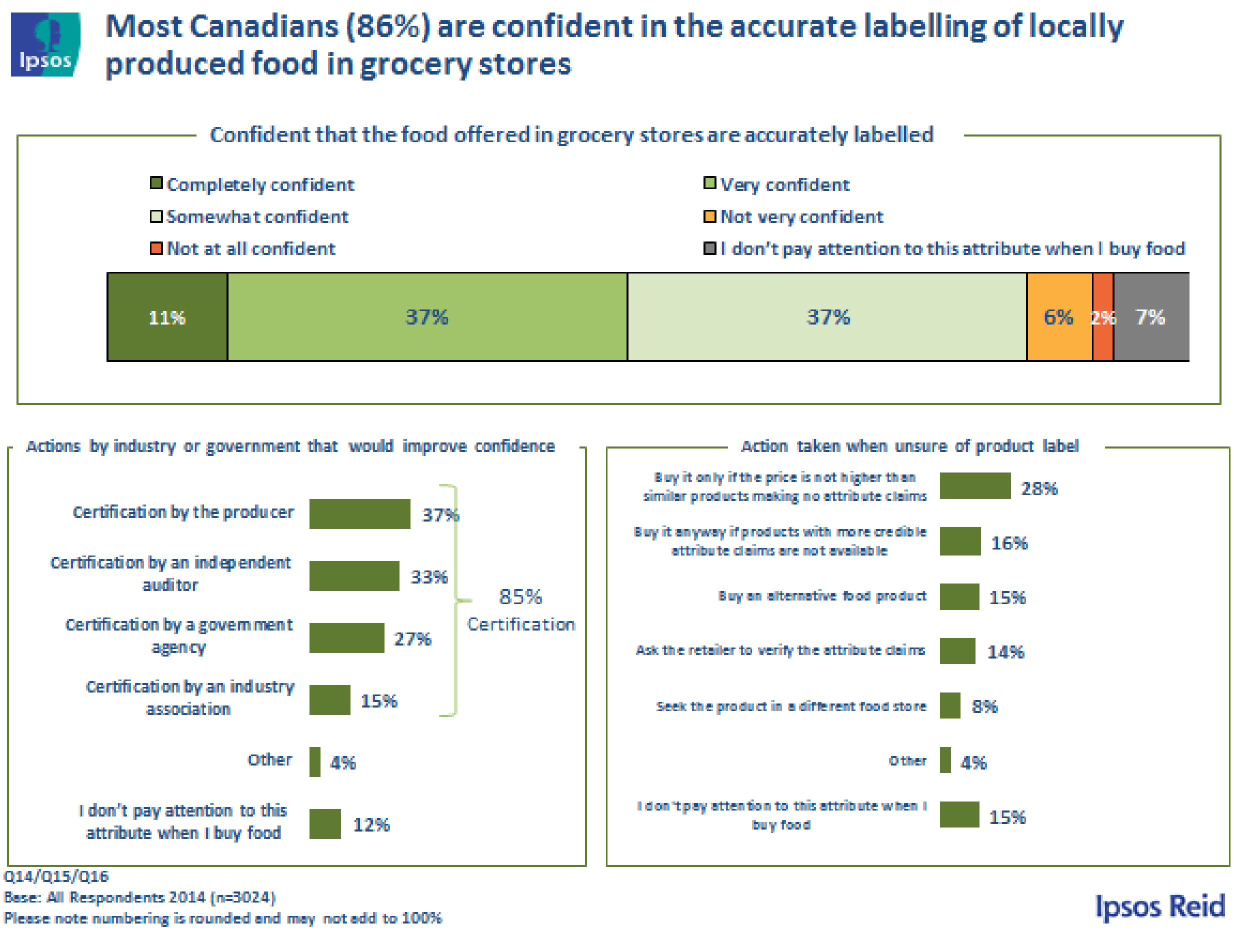
Q4F. Would any of the following measures would you to purchase more locally-produced food products?
Base: Does not purchase locally produced items 2014 (n=545)

Ipsos Reid

When it comes to labelling of locally produced foods in grocery stores, four in five Canadians (86%) are completely, very or somewhat confident that they are accurately labelled.

If they were unsure of the labelling, one in four (28%) say that they would only buy locally produced products if the price was not higher than similar products not making these claims.

When asked how confidence in the accurate labeling of local production can be improved, most Canadians feel that certification of some sort (85%) would improve confidence, with certification by the producer (37%) or an independent auditor (33%) as the top sources.



Those more likely to be **completely/very confident** in labelling of locally produced foods in grocery stores include:

- Women (52%) compared to Men (45%);
- Respondents from Atlantic (54%), Ontario (51%), Quebec (49%), BC (48%) compared to Manitoba (41%) and Saskatchewan (37%); and
- Seek locally produced (62%) compared to those who seek environmentally responsible production (59%).

Those more likely to feel **certification in general** would improve confidence in locally produced foods include:

- Respondents from Atlantic Region (89%), Quebec (86%), Ontario (86%), compared to

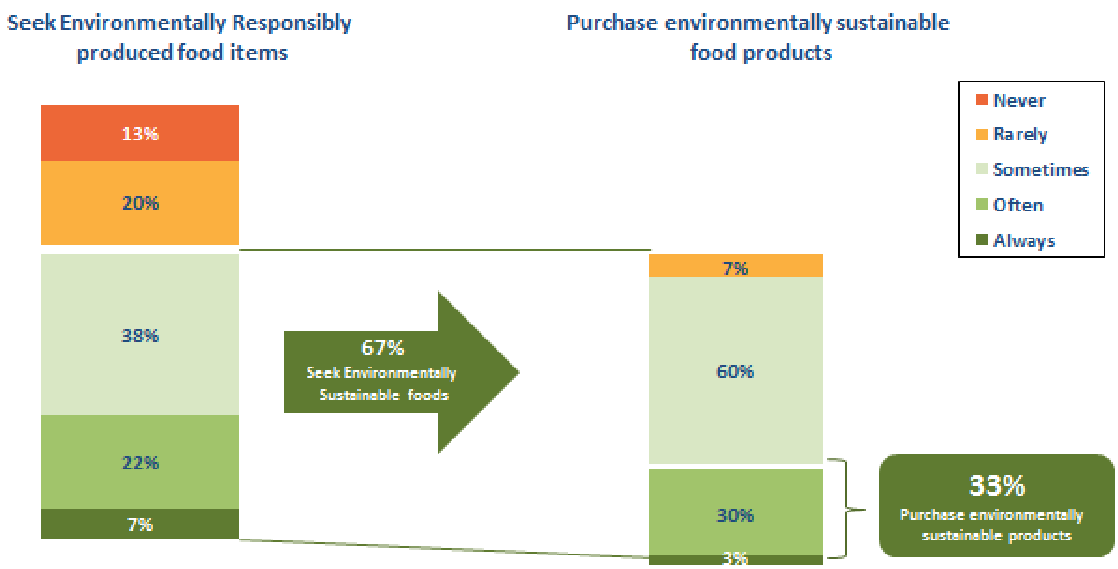
Alberta (80%);

- Older respondents (55+: 88%, 45-54; 87%) compared to younger respondents (18-34: 82%);
- Seek environmentally responsible production (96%) compared to those who seek locally produced (94%); and
- High household income (100K or more: 84%), and middle income (60K to under 100K: 88%; 20K to under 60 K: 87%) compared to those with a low income (under 20K: 78%).

4.3.2 Environmentally Sustainable Products

Most Canadians (67%) at least sometimes seek environmentally responsible food products when grocery shopping, with almost a third (29%) looking for them always or often. One third (33%) of those who at least sometimes seek environmentally responsible food products always or often go on to purchase environmentally responsible food products.

One third of Canadians (29%) seek environmentally responsible products when grocery shopping, while one in three (33%) purchase them



Q1. 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 2014 (n=3024)
Q5A. You mentioned that you look for environmentally responsible production when grocery shopping or dining away from home. Thinking of when you go grocery shopping, how frequently do you purchase environmentally sustainable products?
Base: Seek environmentally sustainable produced items 2014 (n=2013)

Ipsos Reid

Those more likely to **always or often seek** environmentally responsible food products include:

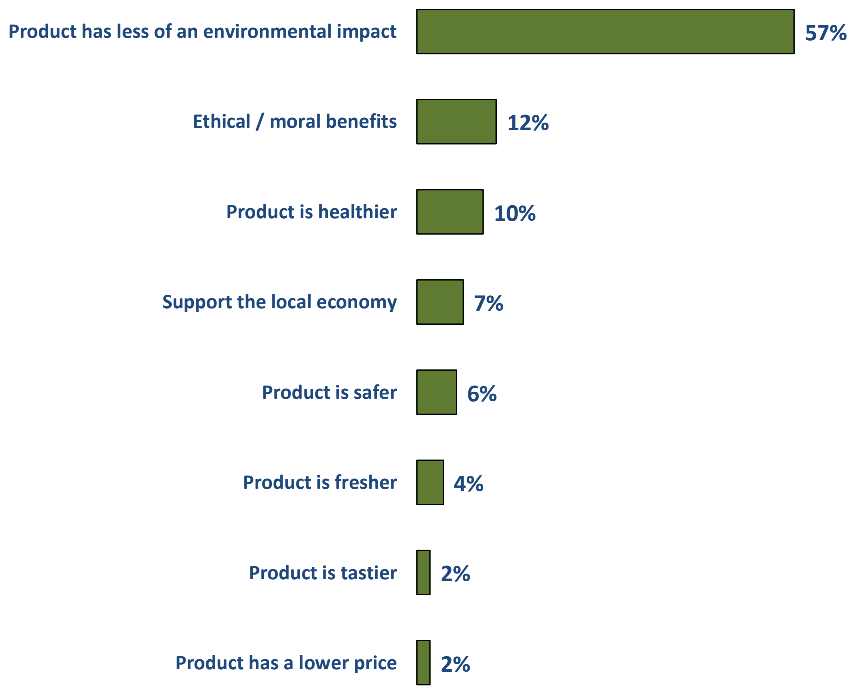
- Women (32%) compared to men (27%);
- Older respondents (55+: 35%) compared to younger respondents (45-54: 26%, 35-44: 26%, 18-34: 27%);
- B.C residents (35%) compared to Ontario (30%), Atlantic (29%), Quebec (28%), Alberta (27%, Saskatchewan (24%), Manitoba (21%);
- A university degree (34%) compared to those with high school (27%) and college/apprenticeship experience (26%); and
- Against irradiation (40%) compared to in favour (30%).

Those more likely to **always or often purchase** environmentally sustainable food products include:

- Residents from Quebec (39%) and Ontario (34%) compared to Alberta (32%), BC (31%), Atlantic (27%), Manitoba (23%) and Saskatchewan (20%); and
- Older respondents (55+: 42%) compared to younger respondents (45-54: 29%, 35-44: 32%, 18-34: 27%).

Six in ten (57%) of those who purchase environmentally responsible products feel that the most important benefit of purchasing these products is the lesser environmental impact such products provide. One in ten feel that the ethical or moral benefits of these products (12%) or that these products are healthier (10%) were the most important benefits.

Six in ten (57%) of those who purchase environmentally responsible products feel reduced environmental impact is the most important benefit



Q5B. In your opinion what is the most important benefit of foods produced using environmentally sustainable methods?
Base: Purchases environmentally sustainable products 2014 (n=1862)

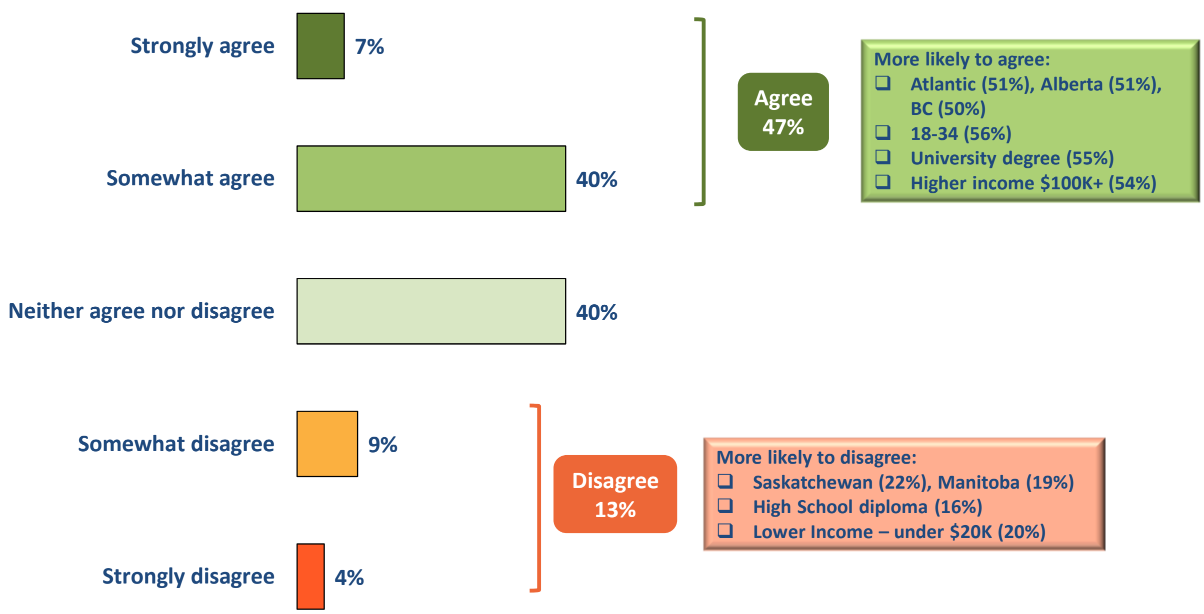
Ipsos Reid

Those who are more likely to consider the product has **less of an environmental impact** as the most important benefit of environmentally responsible food products include:

- Female (59%) compared to male (54%);
- University degree (62%) and college/apprenticeship (57%) compared to high school (53%) and those with none (42%);
- High income (100K or more; 60%), and middle (60K to under 100K: 62%; 20K to under 60K: 57%) compared to low income (under 20K: 48%);
- Do not have children in their household (58%) compared to those who do (51%);
- Seek locally produced (60%) and free range (60%) compared to environmentally responsible production (56%); and
- Against irradiation (65%) compared to those in favour (53%).

Almost half (47%) of those who purchase environmentally responsible food products somewhat or strongly agreed they would be willing to pay more for these products, while one in ten (13%) would not.

Almost half (47%) of purchasers of environmentally responsible foods would be willing to pay more for products with this attribute



5C. 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 environmentally sustainable”.
Base: Purchases environmentally sustainable products 2014 (n=1862)

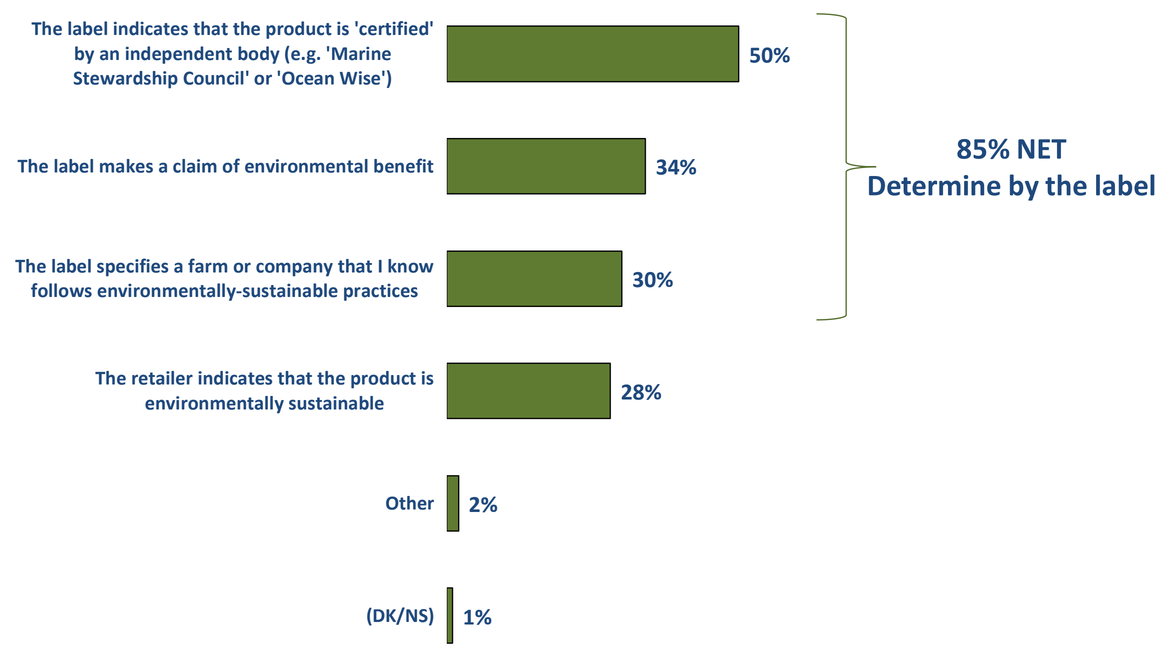
Ipsos Reid

Those who are more likely to **strongly or somewhat agree** that they were willing to pay more for environmentally responsible food products include:

- Respondents from Atlantic (51%), Alberta (51%), BC (50%) and Ontario (48%) compared Quebec (40%);
- Younger respondents (18-34: 56%) compared to middle age (35-44: 48%) and older (45-54: 38%, 55+ 43%);
- University degree (55%) compared to college/apprenticeship (40%), high school (44%) and none (37%);
- Higher income (100K or more: 54%, 60K to under 100K: 53%) compared to lower income (20K to under 60 K: 45%, under 20k: 35%); and
- Seek organic food items (71%), free range (63%) and environmentally responsible produced (60%) compared to locally produced (53%).

Half (50%) of those who purchase environmentally sustainable products trust the label to indicate it is certified by an independent body when determining if a product is environmentally responsible. Three in ten (30%) would trust a label that makes a claim of environmental benefits (34%), specifies a farm or company known to follow environmentally sustainable practises (30%) or if the retailer indicates that the product is environmentally sustainable (28%).

Half (50%) trust certification by an independent body appearing on the product label when determining if it was environmentally responsible

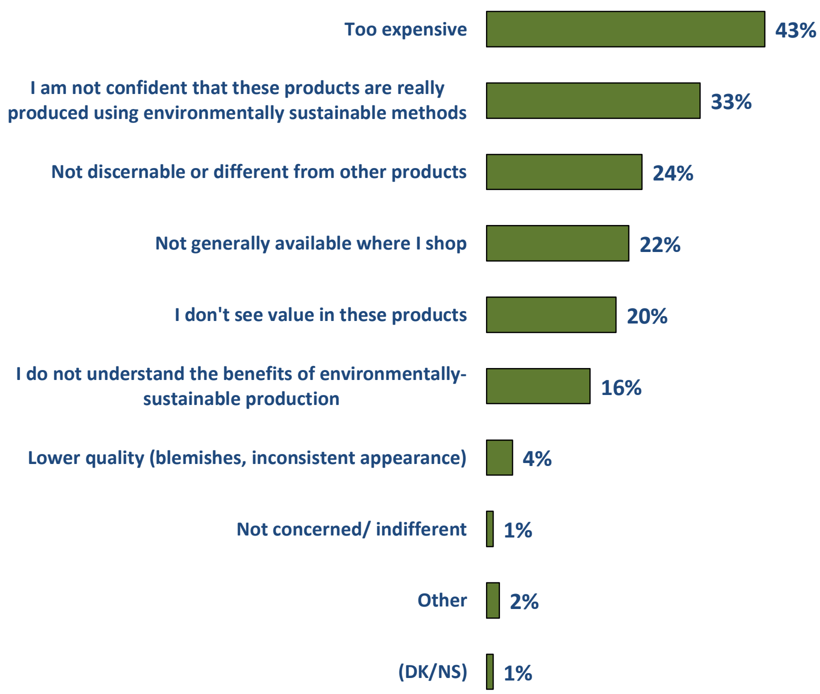


Q5D. How do you determine whether a particular product is environmentally sustainable or not?
Base: Purchases environmentally sustainable products 2014 (n=1862)

Ipsos Reid

Those who do not look for environmentally responsible food products and those who do not purchase them were asked what their main reasons were for not purchasing these items. Four in ten (43%) feel they are too expensive, while three in ten (33%) are not confident enough that these products are produced using environmentally sustainable methods. Similarly two in ten feel they are not discernable or different from other products (24%), that the products are not available where purchasers shop (22%) or that purchasers do not see the value in these products (20%).

Canadians who don't seek out environmentally responsible food products feel that they are too expensive (43%) or are not confident in their claims



5E. What are your main reasons for not purchasing food products labelled as produced using sustainable methods? Base: Does not Purchase environmentally sustainable products 2014 (n=1162)

Ipsos Reid

Those who are more likely to indicate that environmentally responsible food products are **too expensive** as their reason for not purchasing include:

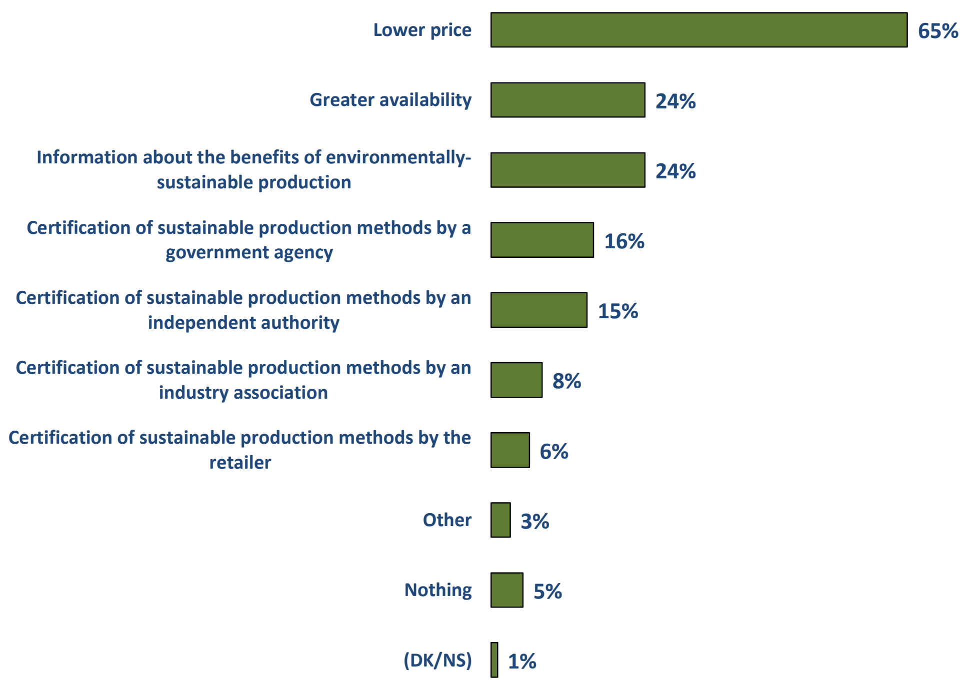
- Respondents from Alberta (52%) compared to Ontario (38%) and Quebec (38%); and
- Seek locally produced food items (38%) compared to organic food items (24%).

Those who are more likely to indicate they were **not confident** enough that these products were produced using environmentally sustainable methods include:

- Older respondents (55+: 41%, 45-54: 40%) compared to younger respondents (18-34:23%, 35-44:28%).

When asked what measures would motivate them to purchase environmentally responsible food products, lower price (65%) was the main motivator. One in four indicated they might be motivated by greater availability (24%) and the availability of information about the benefits of environmentally sustainable production (24%).

Two thirds (65%) of those who don't purchase environmentally sustainable products would be motivated to purchase them if their prices were lower



5F. Would any of the following measures motivate you to purchase more products produced using sustainable methods? Base: Does not Purchase environmentally sustainable products 2014 (n=1162)

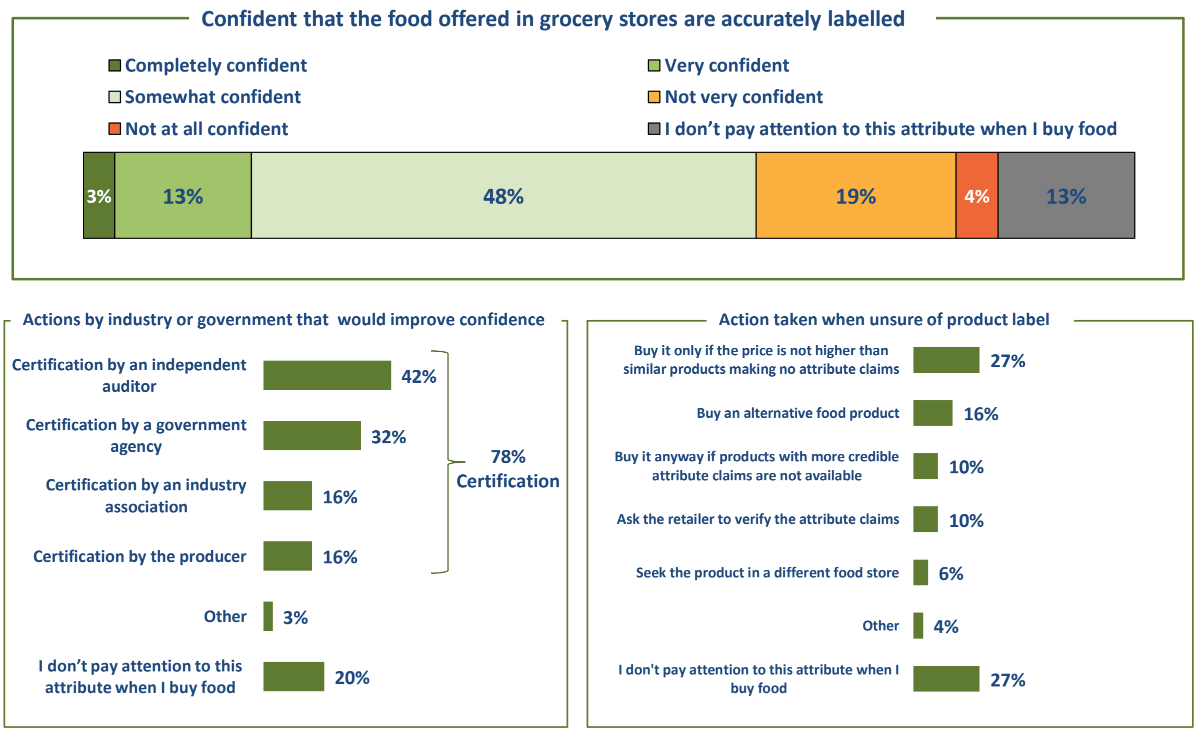
Ipsos Reid

When it comes to labelling of environmentally responsible food products in grocery stores, three in five (64%) Canadians are completely, very or somewhat confident that they are accurately labeled.

Among those unsure of such labelling, one quarter (27%) said they would only buy environmentally sustainable food products if the price is not higher than similar items without such claims.

When asked how confidence in environmentally sustainable food production might be improved, most Canadians (78%) feel certification of some sort would improve confidence. The most preferred certification sources were independent auditors (42%) and government agencies (32%).

Almost half (48%) of Canadians are only somewhat confident that environmentally responsible products are accurately labelled



Q14/Q15/Q16
Base: All Respondents 2014 (n=3024)

Ipsos Reid

Those more likely to be **completely/very confident** in labelling of environmentally responsible foods in grocery stores include:

- Younger respondents (18-34: 19%) compared to older respondents (55+: 14%);
- Have children in household (19%) compared to those who do not (15%);
- Seek food items that are organic (29%), environmentally responsible production of food items (28%) and free range (25%) compared to locally produced (22%); and
- In favour of irradiation (20%) compared to those against (15%).

Those more likely to feel **certification** in general would improve confidence in organically produced foods:

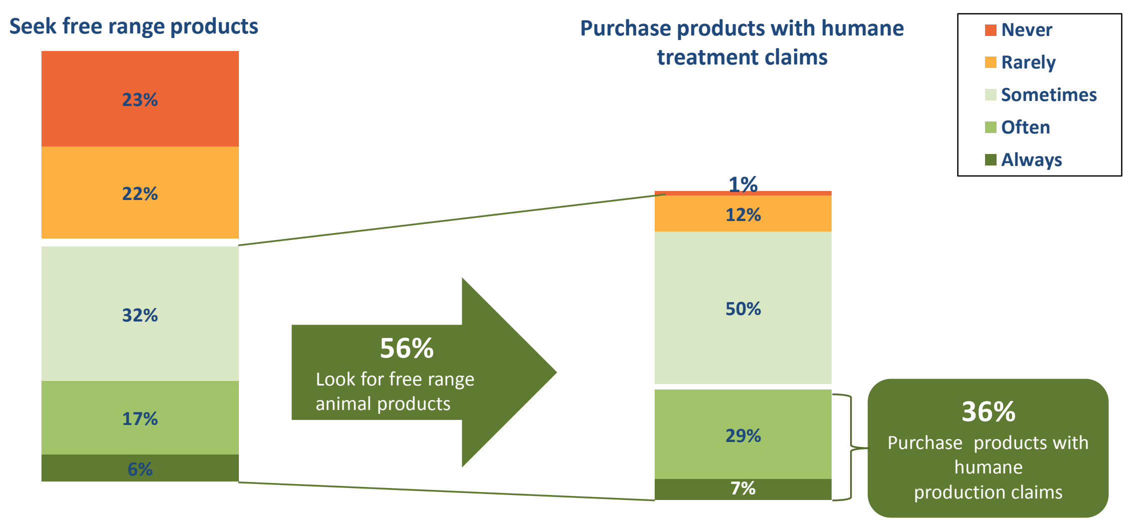
- Women (80%) compared to men (76%);
- Respondents from Quebec (79%), Atlantic Provinces (79%), BC (78%) and Ontario (77%) compared to Manitoba (68%);

- University degree (82%) compared to college/apprenticeship (77%), high school (76%) and none (69%);
- Middle income households (20K to under 60K: 80%); 60K to under 100K: 80%) compared to low income (under 20K: 72%);
- Seek food items that are organic (95%) and environmentally responsible production of food items (95%) compared to locally produced (89%); and
- Against irradiation (87%) compared to those in favour (80%).

4.2.4 Animal Welfare and Free Range Products

Half (56%) of Canadians at least sometimes seek foods with humane production claims (such as free range or humane treatment of animals), while a quarter (23%) always or often look for these products. A third (36%) of those who seek products with humane production claims at least sometimes indicate they always or sometimes purchase such products.

Half of Canadians (56%) at least sometimes look for products with humane production claims , while one in three (36%) go on to purchase them



Q1. 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 2014 (n=3024)
Q6A. You mentioned that you look for free range products when grocery shopping or dining away from home. Thinking of when you go grocery shopping, how frequently do you purchase products described as free range or produced under other conditions related to the treatment of animals?
Base: Seek free range items 2014 (n=1662)
*Please note that numbering is rounded and may not add to 100%

Ipsos Reid

Those more likely to **always or often seek** products with humane production claims when grocery shopping or dinning away from home include:

- Women (27%) compared to men (21%);
- Respondents age 18-34 (27%) compared to respondents 45-54 (22%);
- Respondents from BC (38%) compared to the rest of the country (Alberta (25%), Saskatchewan (23%), Atlantic (23%), Ontario (22%), Quebec (19%) and Manitoba (19%));
- A university degree (26%) compared to high school (21%);
- Against irradiation (38%) compared to in favour (22%); and
- Unconfident in food safety (34%) compared to those who are somewhat (25%) and confident (22%).

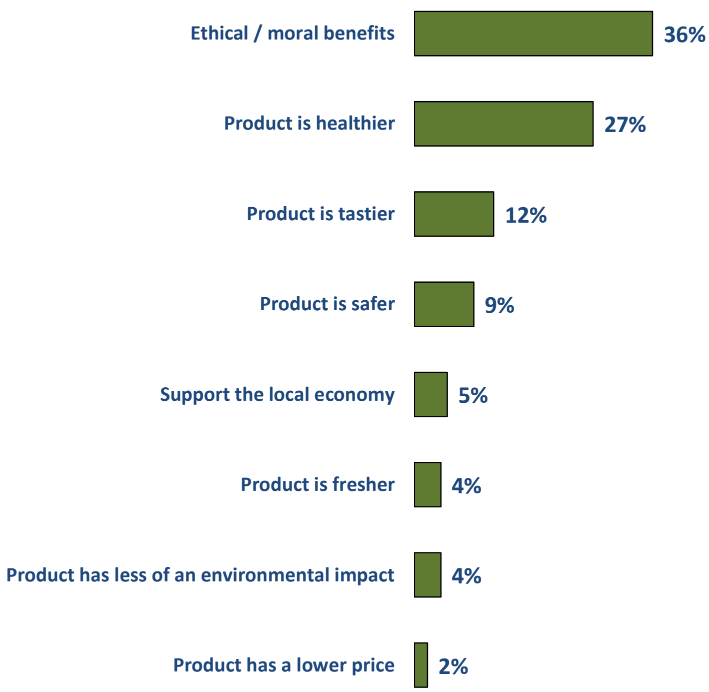
Those more likely to **always or often purchase** products with humane production claims include:

- Seek food items that are organic (61%) and free range (63%) compared to locally (47%) and environmentally sustainably produced (52%); and

- Against irradiation (50%) compared to in favour (39%).

Those who purchase foods with humane production claims were asked what they consider to be the most important benefit of buying these products. Three in ten (36%) felt they were obligated morally/ethically, while one in four felt the products are healthier (27%).

One third (36%) of those who purchase foods with humane production claims feel the ethical benefits are the most important while one in four (27%) feel they are healthier



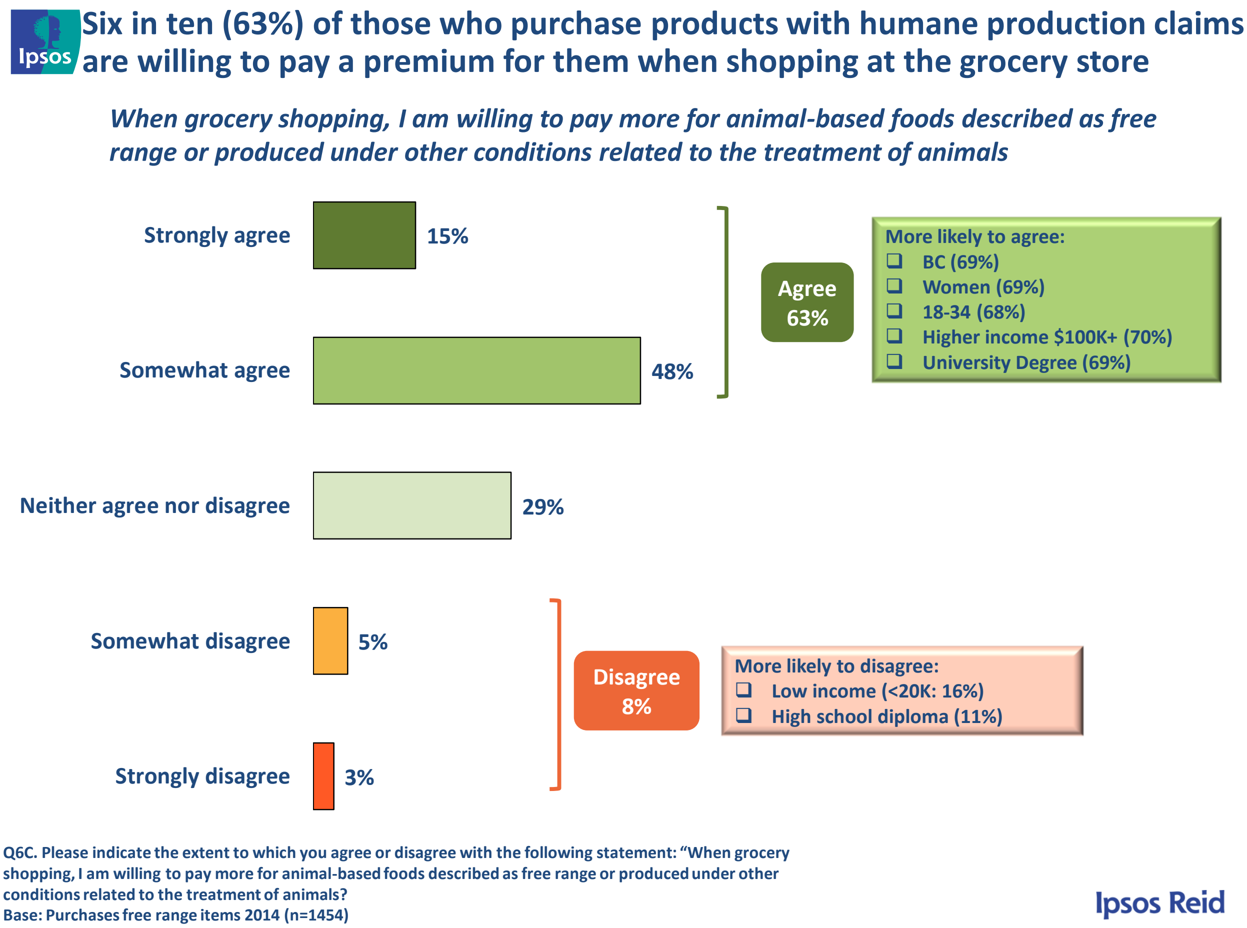
Q6B. In your opinion what is the most important benefit of animal-based foods described as free range or produced under other conditions related to the treatment of animals?
Base: Purchases free range items 2014 (n=1454)

Ipsos Reid

Those who are more likely to consider **moral/ethical benefits** as most important benefit of foods with humane production claims include:

- Women (43%) compared to men (28%);
- Younger respondents (18-34: 40%; 35-44: 41%) compared to older respondents (55+: 31%);
- A university degree (41%) and college/apprenticeship (36%) compared to none (18%);
- Seek foods that are free range (40%) compared to locally produced (37%); and
- Against irradiation (41%) compared to in favour (31%).

Purchasers of foods with humane production claims were asked if they were willing to pay more for such foods. Three in five (63%) somewhat or strongly agreed that they would be willing to pay more for foods with humane production claims while one in five (9%) would not be willing to pay more.

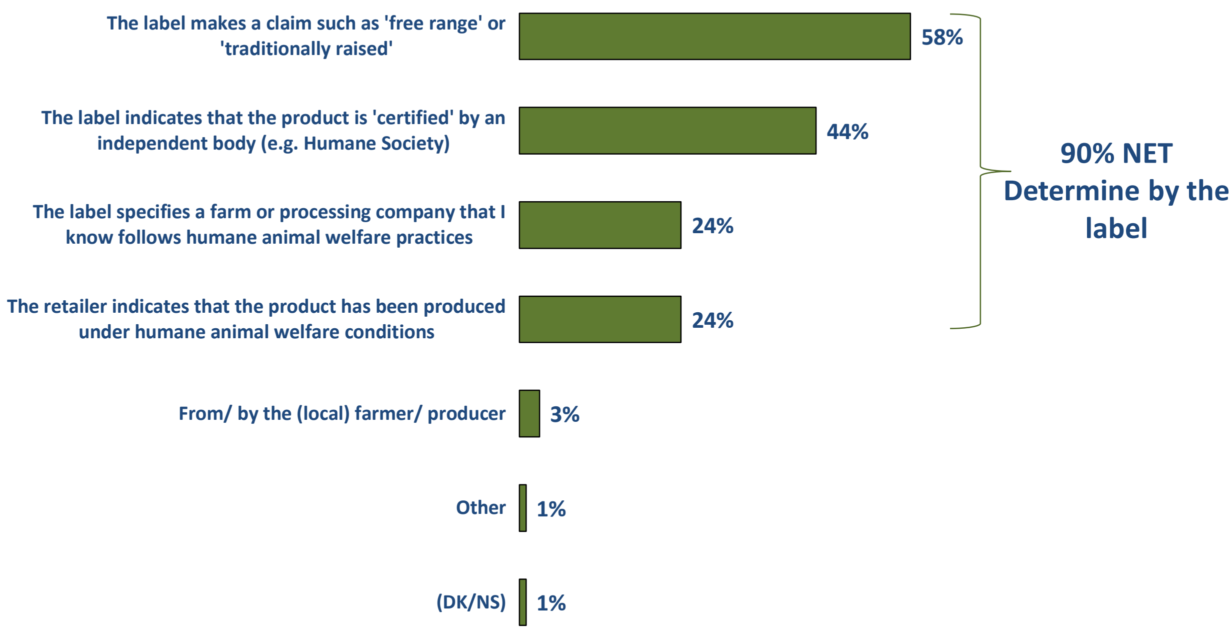


Those more likely to be **willing to pay more** for products with humane production claims include:

- Women (69%) compared to men (57%);
- Young respondents (18-34: 68%) compared to middle age respondents (35-44: 59%, 45-54: 60%);
- Respondents from BC (69%) compared to Ontario (60%); and
- A university degree (69%) compared to college/apprenticeship (59%) and none (47%).

Purchasers of foods with humane production claims were asked how they determine that a food product was produced in a humane manner. Almost six in ten (58%) trust labels that make claims such as 'free range' or 'traditionally raised'. Four in ten (44%) trust labels that indicate the product is certified by an independent body. One in four trust labels that specify a farm that is known to follow humane animal welfare conditions (24%) or a retailer who indicates that the product has been produced under humane animal welfare conditions (24%).

Six in ten (58%) determine if a food is humanely produced based on a claim on the label, two in five (44%) determine it based on a certification on the label

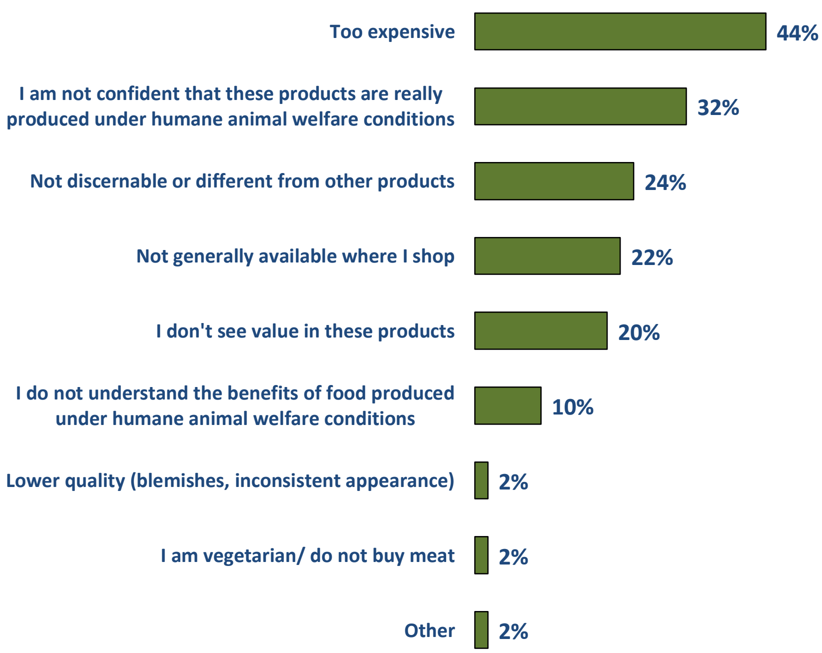


Q6D. How do you determine whether a particular animal-based food is actually free range or produced under other conditions related to the treatment of animals?
Base: Seek free range items 2014 (n=1454)

Ipsos Reid

Those who do not purchase foods with humane production claims were asked to identify their main reasons for avoiding these products. Two in five (44%) feel they are too expensive while three in ten (32%) are not confident that the products were produced under humane animal welfare conditions. One in four feel they cannot discern humane production products from other products (24%), foods with humane treatment claims are not available where they shop (22%) or they do not see any value in foods with humane treatment product claims (20%).

Two in five (44%) feel products with humane production claims are too expensive and one in three (32%) are not confident their claims are true



Q6E. What are your main reasons for not purchasing products described as free range or produced under other conditions related to the treatment of animals?
Base: Does not purchase free range items 2014 (n=1570)

Ipsos Reid

Those who are more likely to indicate that free range food is **too expensive** as their reason for not purchasing labelled food products with humane production claims include:

- Respondents from BC (58%), Manitoba (55%) and Ontario (48%) compared to Quebec (33%);
- Respondents ages 45-54 (49%) compared to 55+ (40%); and
- Against irradiation (41%) compared to in favour (31%).

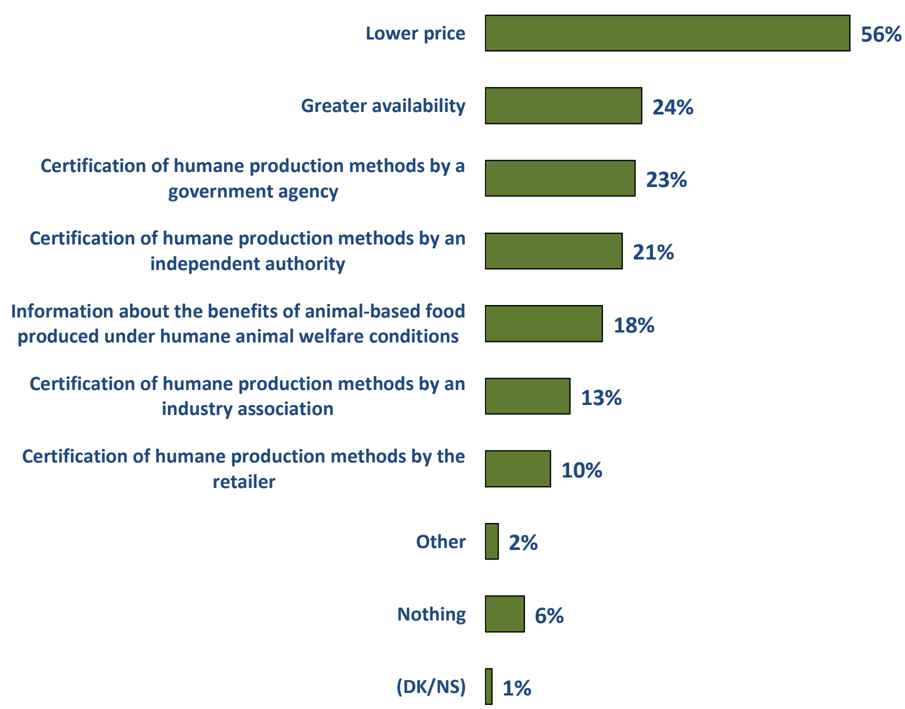
Those who are more likely to indicate that they are **not confident that these products are produced under humane animal welfare conditions** as their reason for not purchasing products labelled with humane production claims include:

- Older respondents (55+: 37%) compared to middle age (35-44:29%) and younger respondents (18-34: 29%); and

- Reside in rural (42%) neighbourhoods compared to urban (31%).

When asked what measures would motivate them to purchase products with humane production claims, over half (56%) stated lower prices. Other possible motivators were greater availability (24%), the certification of humane production methods by a government agency (23%) or independent authorities (21%).

Almost three in five (56%) would be motivated to purchase products with humane production claims if they had a lower price



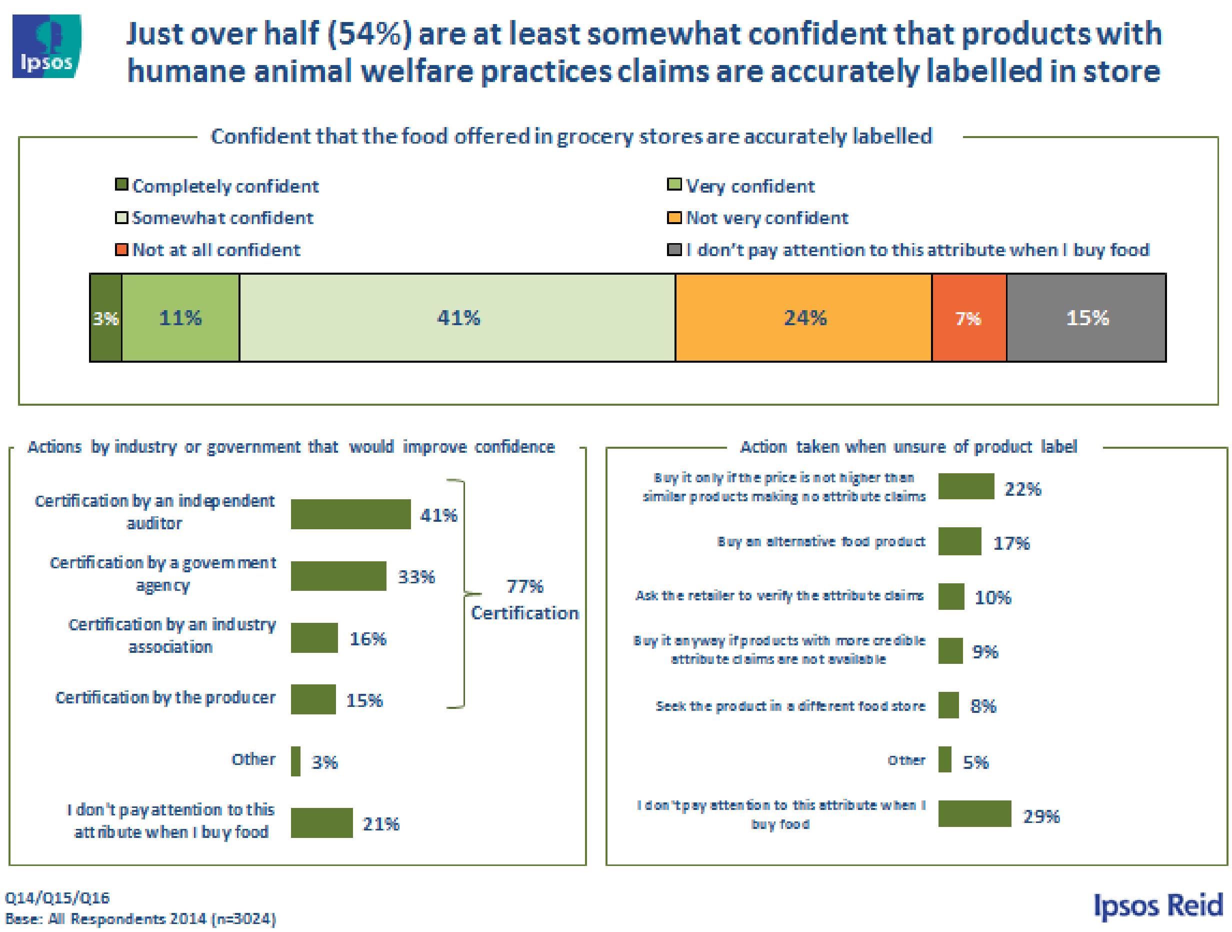
Q6F. Would any of the following measures motivate you to purchase more animal products described as free range or produced under other conditions related to the treatment of animals?
methods?
Base: Does not purchase free range items 2014 (n=1570)

Ipsos Reid

When it comes to labelling of products with humane animal welfare production claims offered in grocery stores, just over half (54%) of respondents are completely, very or somewhat confident such products are accurately labeled.

One in five of those less confident in labelling (22%) said they would only buy products with humane production claims if the price was not higher than similar products without such claims.

When asked how confidence in labelling of foods with humane production claims might be improved, 77% of Canadians felt that certification of some sort would improve confidence. The most preferred certification methods are an independent auditor (41%) and government agencies (33%).



Those more likely to be **completely/very confident** in labelling of foods with humane production claims in grocery stores include:

- Younger respondents (18-34: 16%) compared to older respondents (55+: 12%);
- High school (17%) compared to college/apprenticeship (12%);
- Middle household income (20K to under 60K: 16%; 60K to under 100K: 15%) compared to high income (100K or more: 9%);
- Seek organic (26%), free range (23%) and environmentally sustainable (23%) food items compared to locally produced (19%); and
- Confident (19%) in food safety compared to those who are somewhat (8%) or unconfident (9%).

Those more likely to feel **certification in general** would improve confidence in foods with humane production claims include:

- Residents from BC (80%), Atlantic (80%) and Quebec (79%) compared to Manitoba (71%) and Alberta (71%);
- Women (78%) compared to men (75%);
- Respondents 55+ (79%) years compared to 35-44 (73%);
- A university degree (79%) compared to none (71%);
- Middle yearly household income (20K to under 60K: 78%; 60K to under 100K: 78%) compared to low income (under 20K: 71%); and
- Seek organic (93%), free range (94%) and environmentally sustainable (93%) food items compared to locally produced (87%).

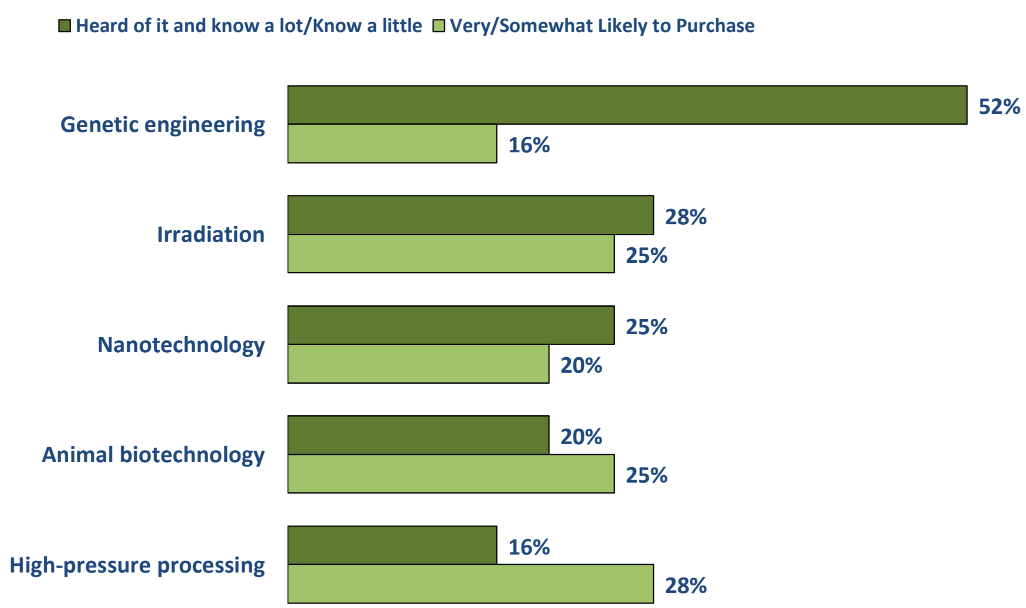
4.3 Food Technologies

Canadians were asked how familiar they are with new and advanced technologies used to produce food items. Half of Canadians have heard of and knew at least something about genetic engineering (52%), about a quarter have heard of nanotechnology (25%) or irradiation (28%) and one in five have heard of and knew something about animal biotechnology (20%) or high-pressure processing (16%).

Those who have heard about these technologies and know at least a little about them, were also asked how likely they were to purchase food that was produced using these methods. While half of Canadians (52%) have heard of and knew something about genetic engineering, less than one in five (16%) are likely to purchase genetically engineered foods. At least a quarter of those who know something about irradiation (25%), animal biotechnology (25%) or high-pressure processing (28%) are likely to purchase these products, while one in five (20%) of those who know something about nanotechnology are likely to purchase products made using this technology.

Half (52%) of Canadians have heard of genetic engineering, three in ten (28%) irradiation and one in four (25%) nanotechnology

- While half (52%) have heard of genetic engineering, just over one in ten (16%) of those who know at least a bit about it are likely to purchase a product made using this technology.

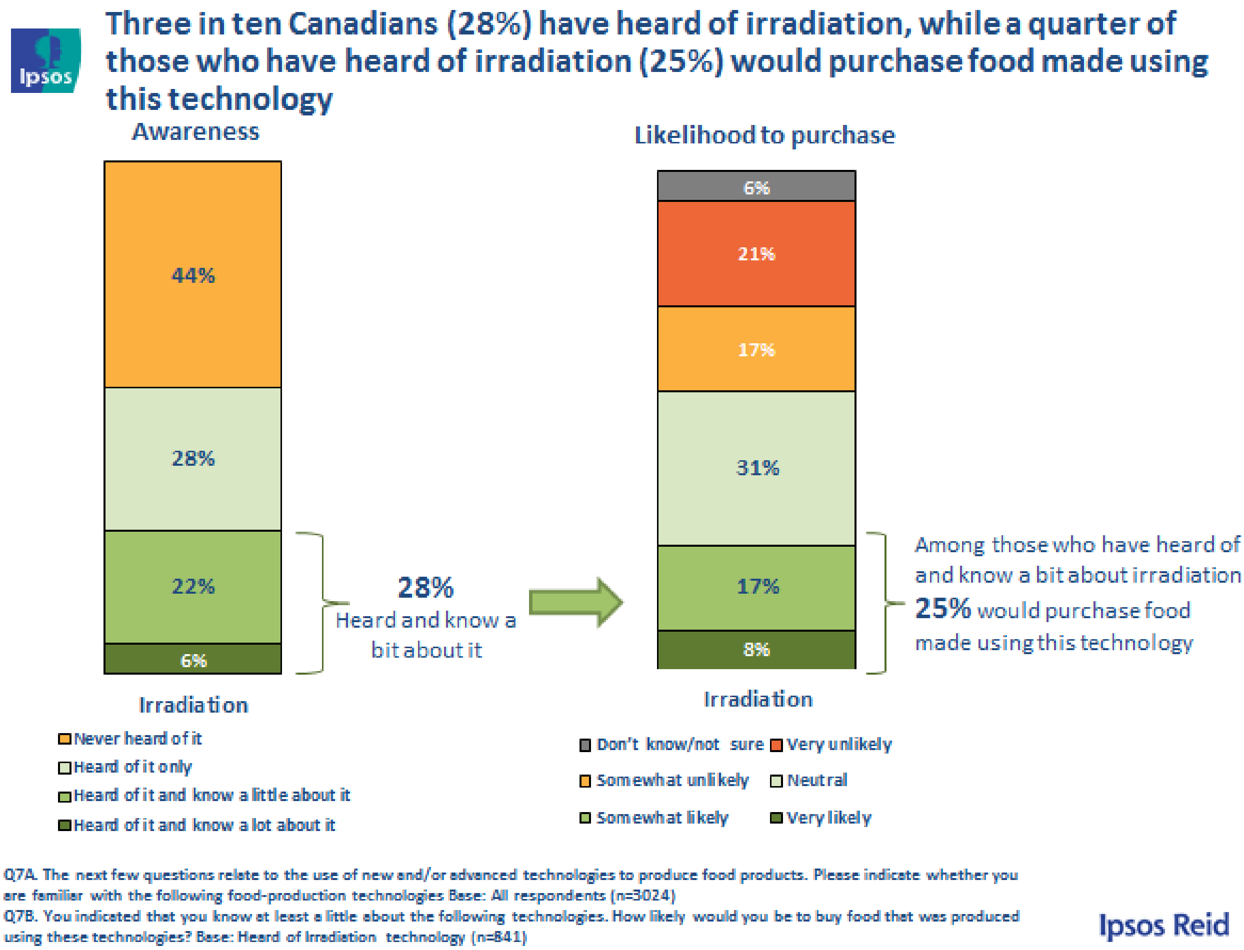


Q7A. The next few questions relate to the use of new and/or advanced technologies to produce food products. Please indicate whether you are familiar with the following food-production technologies Base: All respondents (n=3024)
Q7B. You indicated that you know at least a little about the following technologies. How likely would you be to buy food that was produced using these technologies? Base: Varies

Ipsos Reid

4.3.1 Irradiation

As discussed above, only three in ten Canadians (28%) have heard of and know a little about food produced using irradiation. Of those who know something about it, one quarter (25%) would be somewhat or very likely to purchase foods made using this method.



Those who are more likely to be familiar with **irradiation**, include:

- Men (36%) compared to women (21%);
- University degree (39%), College (24%) and high school (20%) compared to those with none of these (10%);
- Higher household income (100K or more: 34%; 60K to under 100K: 33%) compared to lower income (20K to under 60K: 27%; under 20K: 22%);
- Live in urban area (29%) compared to rural (22%);
- English spoken at home (30%) compared to French (20%);
- Seek organic (40%), free range (38%) and environmentally responsible production (35%) compared to locally produced (31%); and
- Have a poor/very poor (40%) overall impression of quality compared to average impression (28%).

Those more likely to buy food that was processed by **irradiation** include:

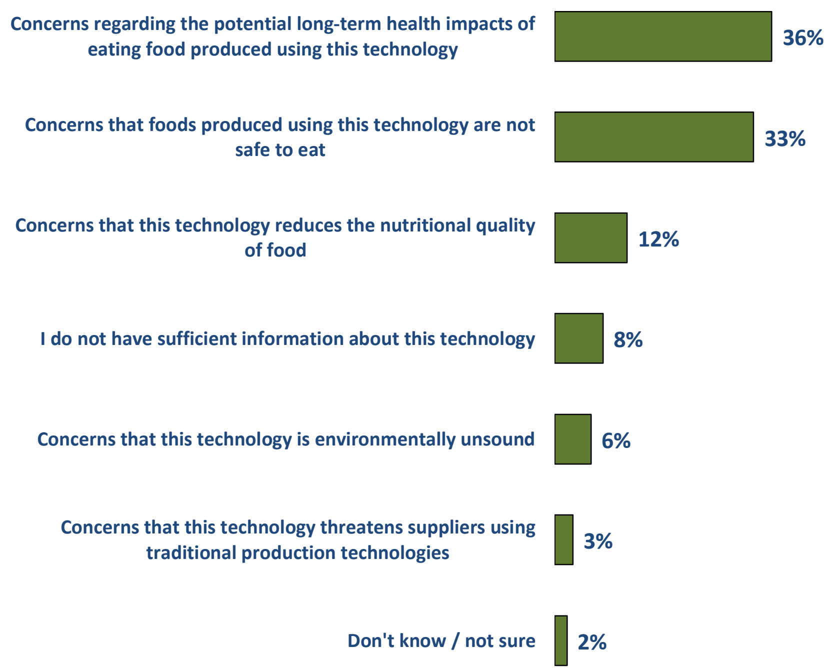
- Men (30%) compared to women (18%);
- Respondents from Western Provinces (30%; especially Manitoba: 45%) compared to Atlantic

Provinces (27%), BC (22%), Ontario (22%) and Quebec (21%);

- In favour (53%) of irradiation compared to those against (5%);
- Excellent/good (27%) overall impression of food quality compared to average impressions (15%); and
- Confident (33%) and somewhat confident (17%) in food safety compared to those who are not confident (3%).

Those who were unlikely to purchase irradiated foods were asked what their most important reason was for avoiding them. One in three noted that the long-term health impacts (36%) or safety (33%) are their top concerns.

Long-term health impacts (36%) and safety (33%) were the top concerns of those who would not eat irradiated foods



Q7C. You indicated that you would be somewhat or very unlikely to buy food produced using the following technologies. For each one, please indicate the most important reason for your reluctance to buy them:
Base: Hear of and unlikely to buy food produced using [Irradiation] technology 2014 (n=339)

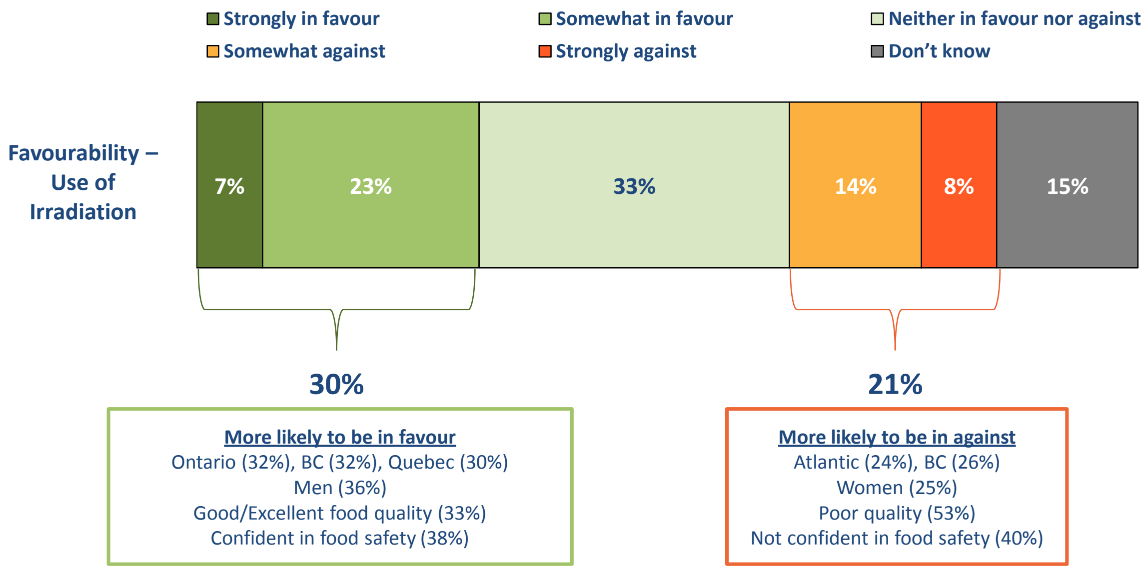
Ipsos Reid

Canadians are uncertain how favourably they view irradiation given its definition. One in three (33%) are neither for nor against its use and 15% don't know whether they are in favour or against its use. One in five (21%) are against the use of irradiation, however only one in ten (8%) are strongly against. Three in ten (30%) are in favour of the use of irradiation, but less than one in ten (7%) are strongly in favour.

One in three Canadians (33%) are neither in favour nor against irradiation

- British Columbians represent a more polarized view on irradiation, as they are more likely to be for (32%) or against (26%) its use, while Albertans are more likely to be neutral (40%)

Irradiation is a process that uses ionizing radiation as a food safety measure to reduce the levels of bacteria that cause food poisoning and food spoilage.



Q12A. Please indicate your feelings about it on the scale below
Q7A. The next few questions relate to the use of new and/or advanced technologies to produce food products. Please indicate whether you are familiar with the following food-production technologies
Base: All Respondents 2014 (n=3024) Please note: numbering is rounded and may not add up to 100%

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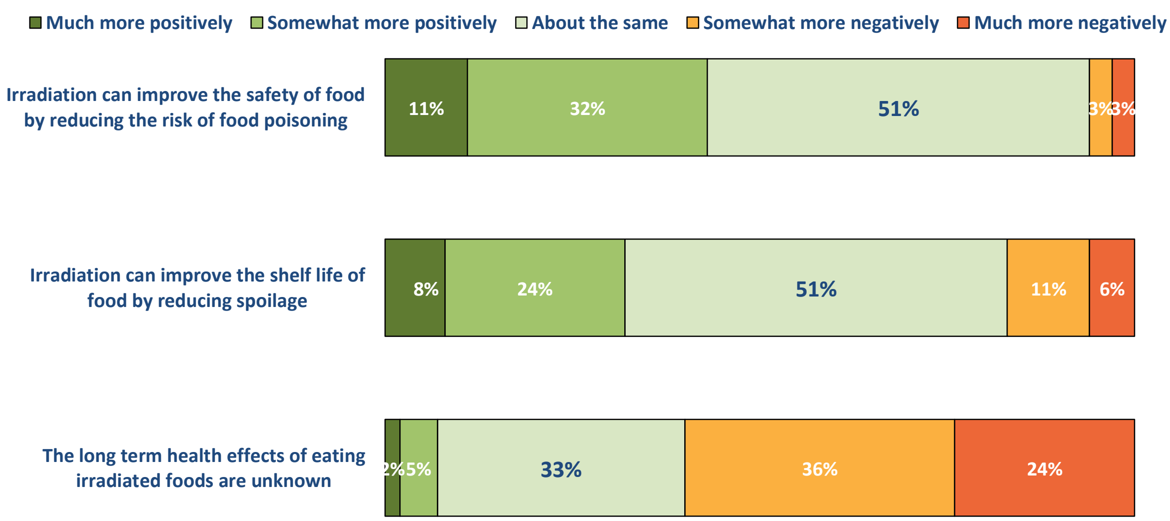
Those more likely to be in **favour** of the use of irradiation include:

- Residents of Ontario (32%), BC (32%) and Quebec (30%), compared to those in the Atlantic Provinces (23%);
- Men (36%) compared to women (25%);
- Those who feel that food quality in Canada is good or excellent (33%) compared to those who feel the food quality is average (16%) or poor (15%); and
- Those who are confident in the safety of food in Canada (38%) compared to those who are not confident (15%).

Respondents were presented with three statements regarding different benefits and drawbacks of using irradiation.

Two in five Canadians (43%) feel somewhat or much more positively about the use of irradiation when presented with the information that it can reduce the risk of food poisoning, while one in three (32%) feel more positively about irradiation when presented with information that it would improve the shelf life of food. Three in five (60%) viewed irradiation somewhat or much more negatively when presented with the drawback that the long-term health effects are not known.

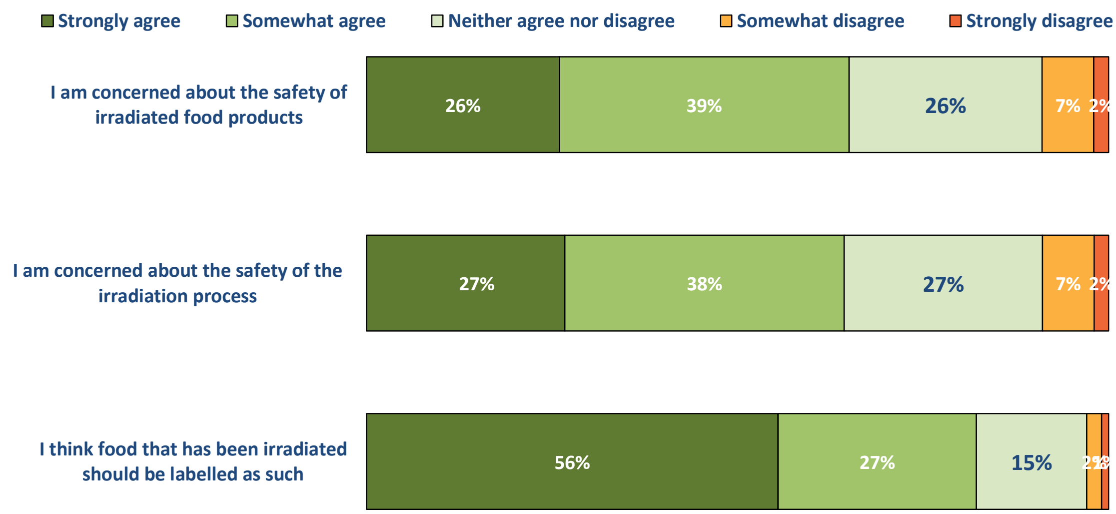
Most Canadians views did not change when informed of improved safety (51%) or shelf life (51%) of irradiated foods



Q12B. If you know that [STATEMENT FROM LIST], how would this make you feel regarding the use of this process?
Base: All Respondents 2014 (n=3024)

The majority of Canadians (83%) agree that irradiated foods should be labelled as such, with over half strongly agreeing (56%). A quarter of Canadians strongly agree that they are concerned about the safety of irradiated food products (26%) and the safety of the irradiation process (27%).

Over half of Canadians (56%) strongly agree that irradiated foods should be labelled



Q12C. Please indicate whether you agree or disagree with the following statements about food irradiation.
Base: All Respondents 2014 (n=3024)

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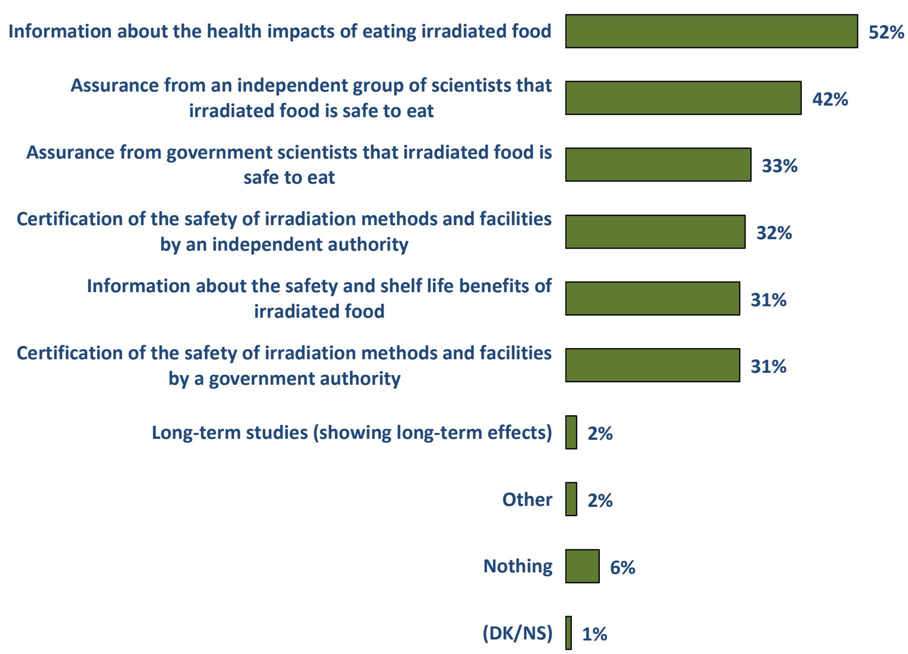
Canadians were asked what would make them feel more confident in purchasing irradiated foods. Half (52%) feel that information about the health impacts of eating irradiated food would assist in making them more confident, while two in five (42%) feel that assurance from an independent group of scientists that irradiated food is safe to eat would make them more confident. One in three (33%) would like assurance from the government (33%), certification by an independent authority (32%) or certification by a government authority (31%). More information about the safety and shelf life benefits (31%) would also help some feel more confident. Although many were concerned with the long-term health risks, only 2% feel that long-term studies showing the long-term effects would make them more confident.

Half of Canadians (52%) would feel more confident if they were provided with more information about the health impacts of eating irradiated food



Q13A. Which of the following would make you feel more confident about purchasing irradiated foods?
Base: All Respondents 2014 (n=3024)

Ipsos Reid

Two in five Canadians would consider the purchase of irradiated foods acceptable if either all irradiated foods were labelled as such allowing consumers to make informed choices (39%) or if an independent group of scientists evaluated irradiation technology and concluded that it improves food safety and is at least as safe and nutritious as non-irradiated alternatives (38%). Three in ten (31%) would consider purchasing irradiated food if government scientists evaluated it to be as safe and nutritious as alternatives.

Two in five would purchase irradiated foods if they were labelled (39%) or evaluated by independent scientists (38%)

Q13B. Would you consider the purchase of irradiated foods acceptable under any of the following conditions?
Base: All Respondents 2014 (n=3024)

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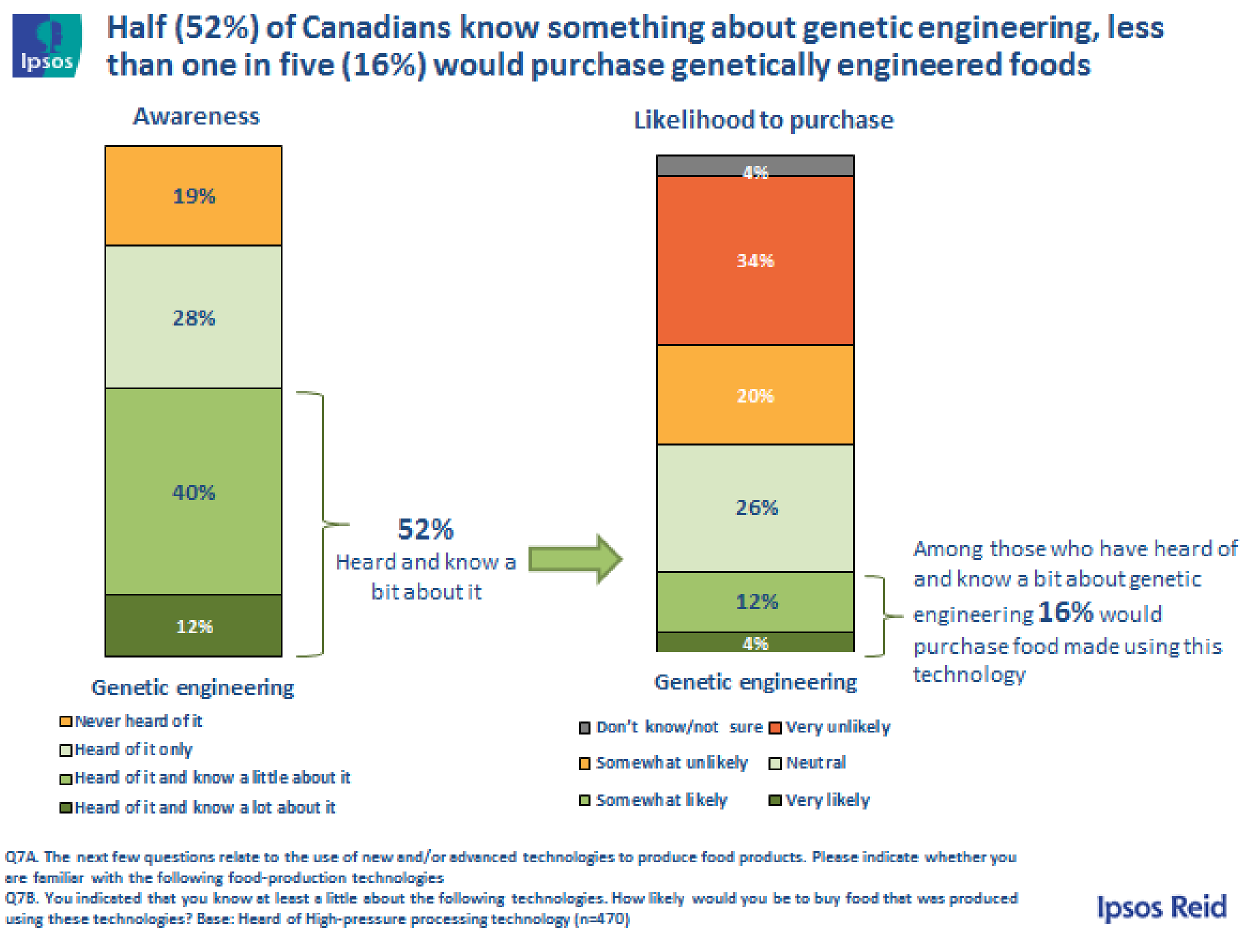
4.3.2 Genetic engineering

Most Canadians (80%) have heard about genetic engineering and half (52%) know a bit about it. However, less than one in five (16%) of those who know a bit about it would purchase genetically engineered food products.



Those who are more likely to be familiar with **genetic engineering** include:

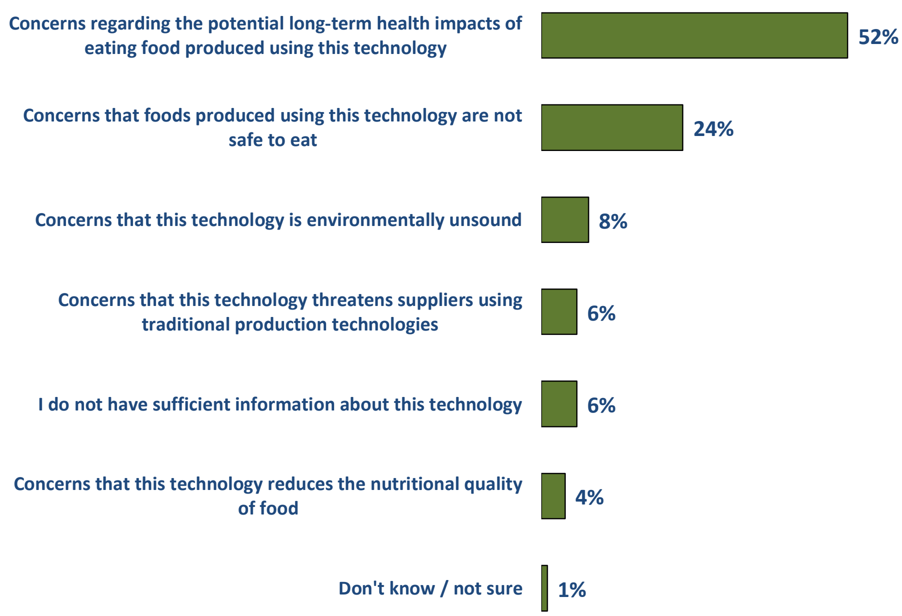
- Men (57%) compared to women (47%);
- Young respondents (18-34: 56%) compared to middle aged (45-54: 50%);
- University degree (66%), college/apprenticeship (49%) and high school (41%) compared to those with none of these (28%);
- High yearly household income (100K or more: 61%) compared to lower income (20K to under 60K: 50%; under 20K: 45%);
- Language at home is English (61%) and other language (61%) compared to French (23%);
- Seek organic (70%) and free range (66%) food products than environmentally responsible production (60%) and locally produced (58%); and
- Confident (55%) and somewhat confident in food safety (51%) compared those who are unconfident (43%).

Those more likely to buy food that was developed through **genetic engineering** include:

- Men (20%) compared to women (12%);
- Respondents from Western Provinces (19%; especially Saskatchewan: 29%) compared to BC (14%), Ontario (14%) and Quebec (15%);
- Young respondents (18-34: 23%) compared to middle-aged (35-44: 13%; 45-54: 11%) and older respondents (55+: 15%);
- University degree (19%) compared to high school (12%);
- High income (100K or more: 26%) compared to middle income (60K to under 100K: 16%; 20K to under 60K: 14%);
- Seek environmentally responsible production (14%) of food items compared to free range (11%);
- In favour (31%) of irradiation compared to those against (6%);
- Excellent/good (18%) overall impression of food quality compared to average impression (10%); and
- Confident (21%) and somewhat confident (11%) in food safety compared to those who are not confident (4%).

The most important reason not to purchase genetically modified foods for those unlikely to purchase them was the potential long-term health impacts (52%). A quarter (24%) of Canadians who would not purchase genetically modified foods feel the most important reason is that these foods are not safe to eat.

Half (52%) of those unlikely to eat genetically engineered foods are concerned with the potential long-term health impacts

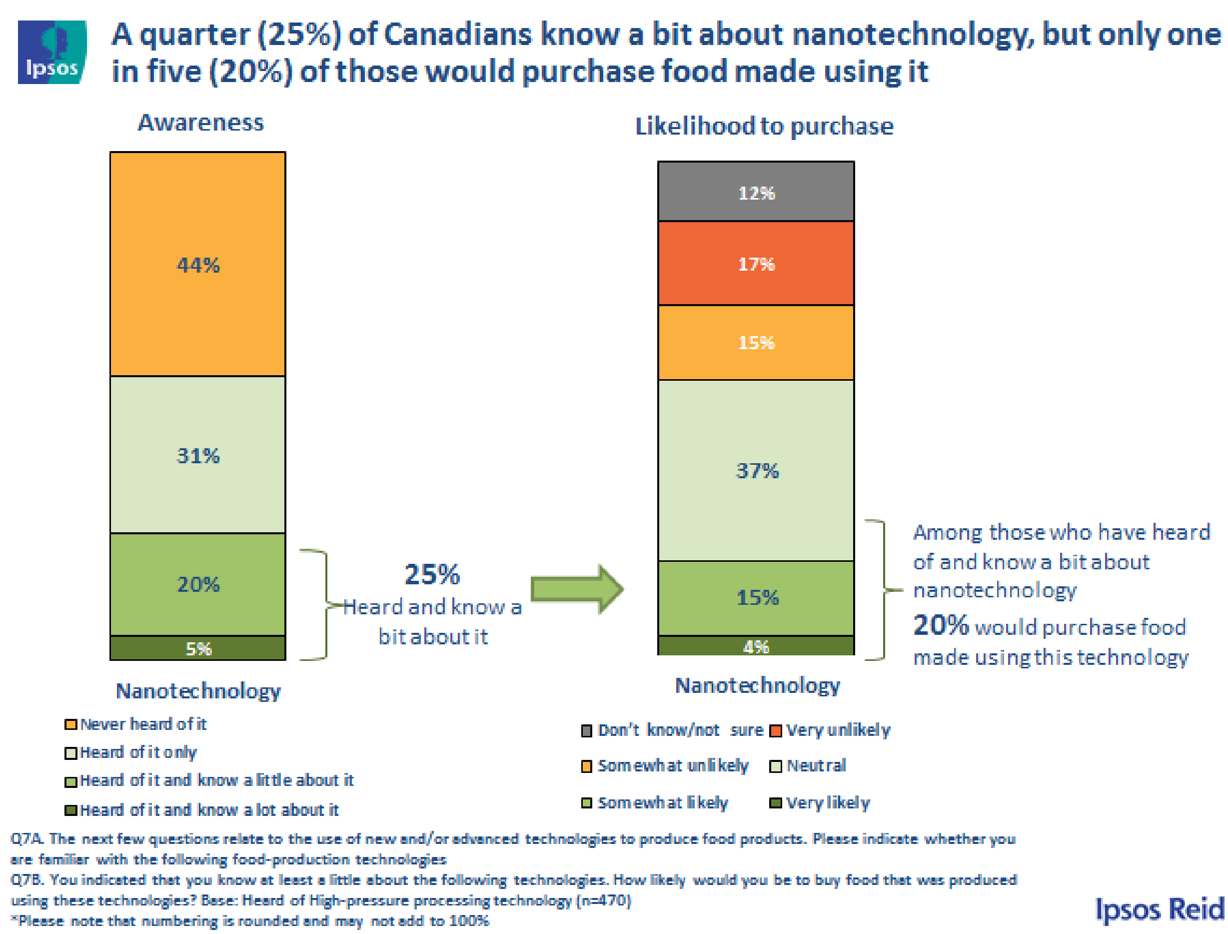


Q7C. You indicated that you would be somewhat or very unlikely to buy food produced using the following technologies. For each one, please indicate the most important reason for your reluctance to buy them:
Base: Hear of and unlikely to buy food produced using [Genetic engineering] technology 2014 (n=890)

Ipsos Reid

4.3.3 Nanotechnology

Half of Canadians (56%) have heard of nanotechnology, but only a quarter (25%) have heard and know a bit about it. One in five (20%) of those who know something about nanotechnology would purchase foods made using this technology.



Those who are more likely to be familiar with **nanotechnology** include:

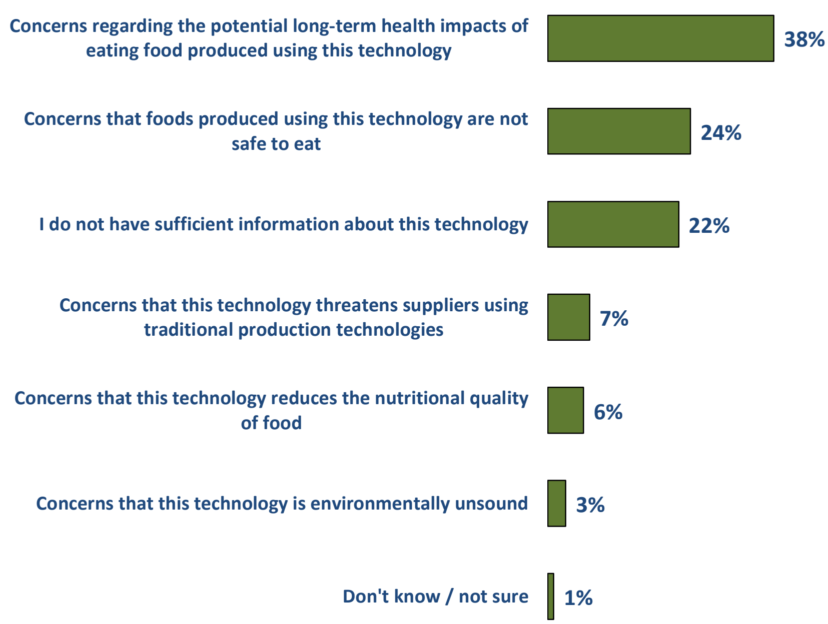
- Men (37%) compared to women (17%);
- Young respondents (18-34: 33%) compared to middle aged (35-44: 27%; 45-54: 26%) and older people (55+:18%);
- University degree (37%), college (22%) and high school (15%) compared to those with none of these (7%);
- High household income (100K or more: 35%) compared to middle income (60K to under 100K: 27%; 20K to under 60K: 23%) and low income (under 20K: 23%);
- Live in an urban area (27%) compared to rural (17%);
- Speak a language other than French or English at home (43%) compared to English (27%) and French (18%);
- Have children in the household (30%) compared to those without (24%); and
- Seek organic (37%), free range (32%) and environmentally responsible production (29%) compared to locally produced foods (26%).

Those more likely to buy food that was processed by **nanotechnology** include:

- Men (23%) compared to women (14%);
- Respondents from Western Provinces (26%; especially Alberta: 30%) compared to BC (20%) and Ontario (14%);
- Young respondents (18-34: 29%) compared to middle-aged (35-44: 18%; 45-54: 14%) and older respondents (55+: 10%);
- High household income (100K or more: 45%) compared to middle (60K to under 100K: 19%; 20K to under 60K: 15%) and low income (under 20K: 17%);
- Have children in household (26%) compared to those who do not (18%);
- In favour (34%) of irradiation compared to those against (8%); and
- Confident (26%) in food safety compared to those only somewhat confident (12%) and unconfident (2%).

Those who were unlikely to purchase food made with nanotechnology indicate the most important reason for their reluctance is concerns regarding potential long-term health impacts (38%), that it is not safe to eat (24%) or that they do not know enough about it (22%).

The top concern for those unlikely to purchase foods made using nanotechnology is the potential long-term health impacts (38%)

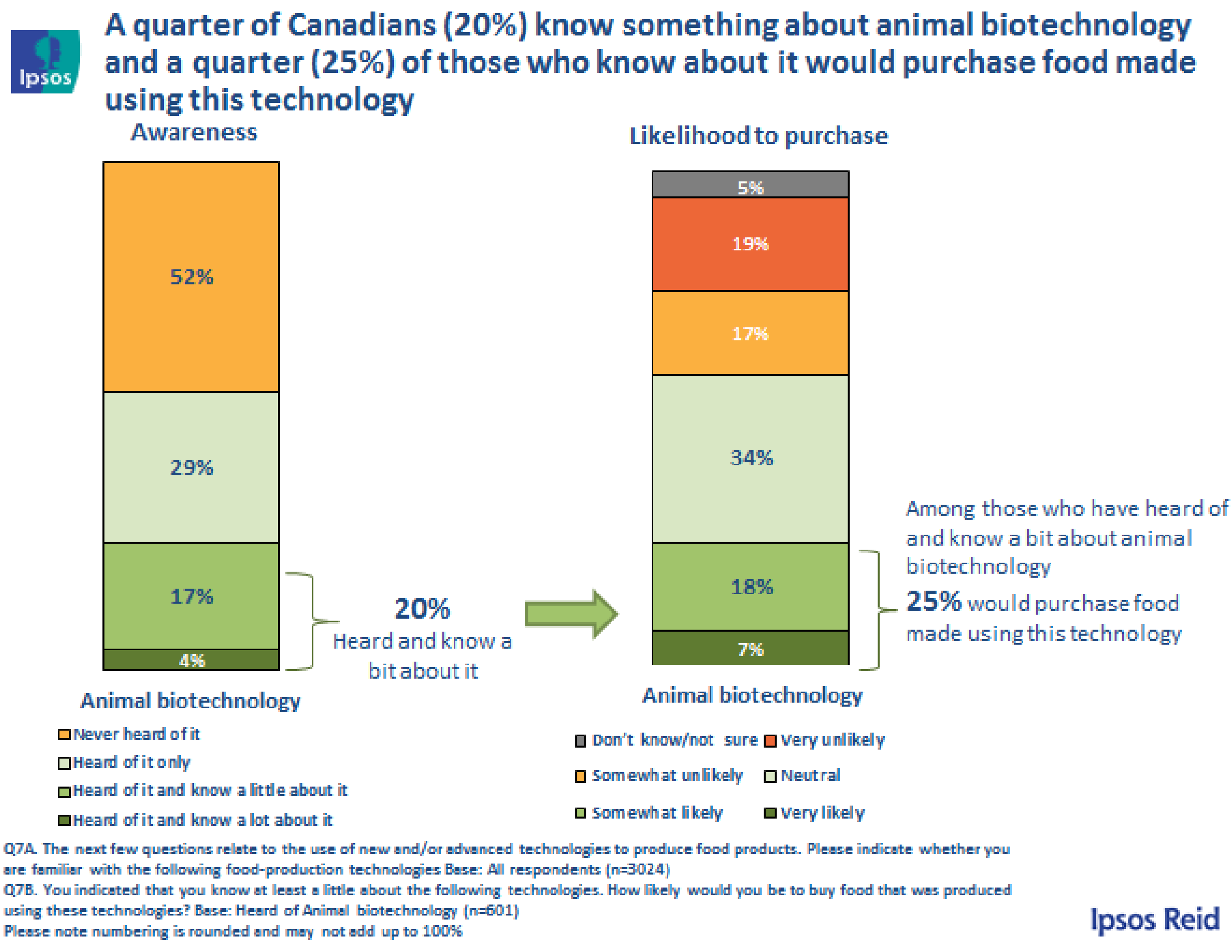


Q7C. You indicated that you would be somewhat or very unlikely to buy food produced using the following technologies. For each one, please indicate the most important reason for your reluctance to buy them:
Base: Hear of and unlikely to buy food produced using [Nanotechnology] technology 2014 (n=232)

Ipsos Reid

4.3.4 Animal biotechnology

Half of Canadians (50%) have heard of animal biotechnology used to produce food products and one in five (20%) know something about it. A quarter of those who know about animal biotechnology would be likely to purchase food made using this technology.



Those who are more likely to be familiar with **animal biotechnology** include:

- Men (25%) compared to women (15%);
- Young respondents (18-34: 23%) and middle aged (35-44: 22%) compared to older (55+: 17%);
- University degree (28%) and college (17%) compared to high school (13%) and those with none of these (11%);
- Higher household income (100K or more: 24%; 60K to under 100K: 23%) compared to lower household income (20K to under 60K: 19%);
- Language at home is English (22%) and other language (25%) compared to French (13%);
- Seek organic (35%), free range (28%) and environmentally responsible production (29%) compared to locally produced (23%); and
- Have a poor/very poor (40%) overall impression of quality compared to average (21%) and excellent/good impression (20%).

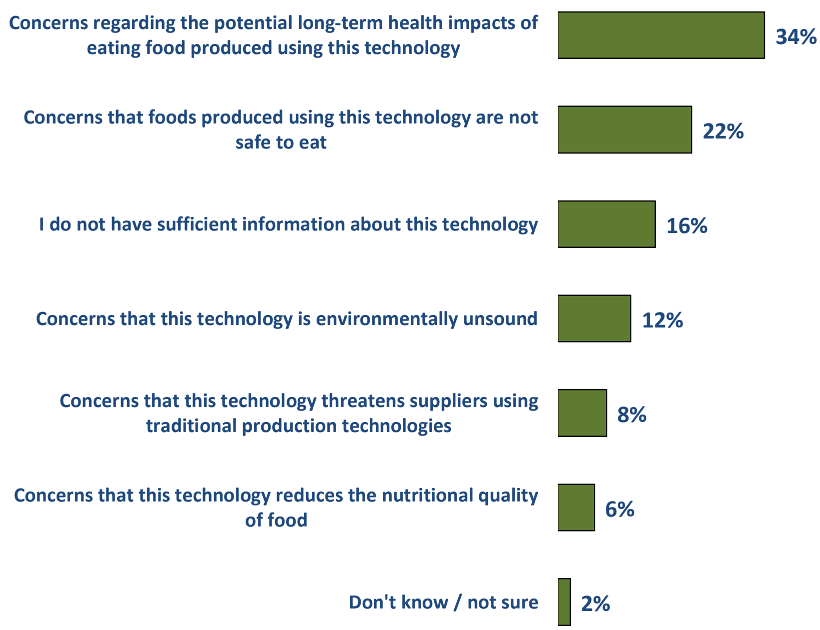
Those more likely to buy food that was processed by **animal biotechnology** include:

- Men (31%) compared to women (17%);

- Respondents from Western Provinces (29%) compared to BC (22%);
- Young respondents (18-34: 36%) compared to middle aged (35-44: 23%; 45-54: 18%) and older respondents (55+: 19%);
- High household income (100K or more: 45%) compared to middle income (60K to under 100K: 24%; 20K to under 60K: 23%);
- Have children in household (36%) compared to those who do not (22%);
- In favour (45%) of irradiation compared to those against (7%);
- Excellent/good (28%) overall impression of food quality compared to average impression (15%); and
- Confident (33%) in food safety compared to those only somewhat confident (18%) and unconfident (7%).

Concerns regarding long-term health impacts (34%) and whether it is safe to eat (22%) are the most important reasons given by those reluctant to purchase food made using animal biotechnology.

Long-term health impacts (34%) is again the top concern of those unlikely to purchase foods made using animal biotechnology

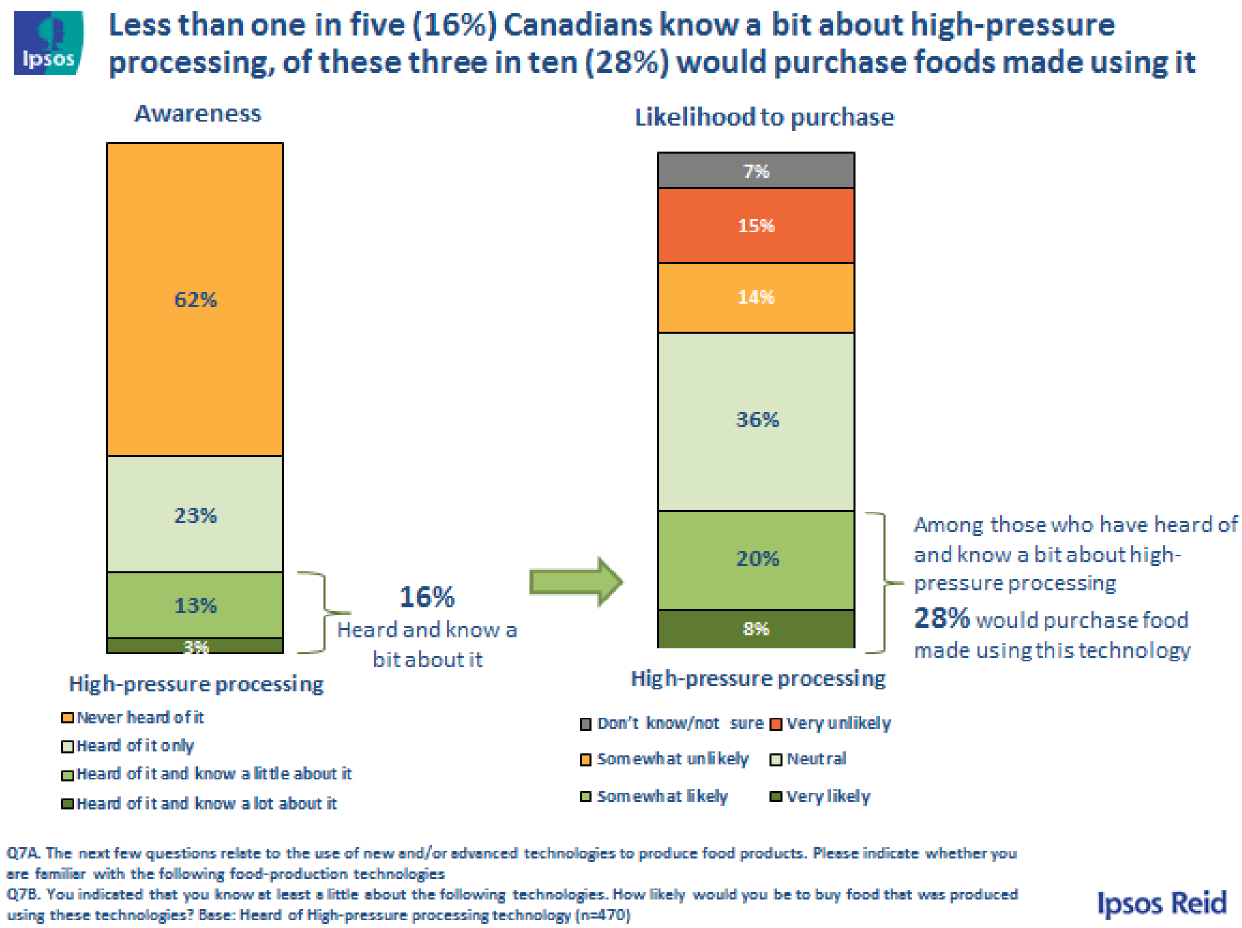


Q7C. You indicated that you would be somewhat or very unlikely to buy food produced using the following technologies. For each one, please indicate the most important reason for your reluctance to buy them:
Base: Hear of and unlikely to buy food produced using [Animal biotechnology] technology 2014 (n=234)

Ipsos Reid

4.3.5 High-pressure processing

Two in five (39%) Canadians have heard of high-pressure processing related to food production, however only 16% know a bit about it. Of those who know a bit about high-pressure processing, three in ten (28%) would be likely to purchase food using this method.



Those who are more likely to be familiar with **high-pressure processing** include:

- Men (17%) compared to women (14%);
- University degree (20%) compared to college (14%), high school (11%) and those with none of these (11%);
- English spoken at home (17%) compared to French (10%);
- Seek organic (29%), free range (24%) and environmentally responsible (23%) compared to locally produced (19%);
- Have a poor/very poor overall impression of quality (29%) compared to excellent/good impression (15%); and
- Have confidence (16%) and somewhat are confident in food safety (16%) compared those who are not (10%).

Those more likely to buy food that was processed by **high-pressure processing** include:

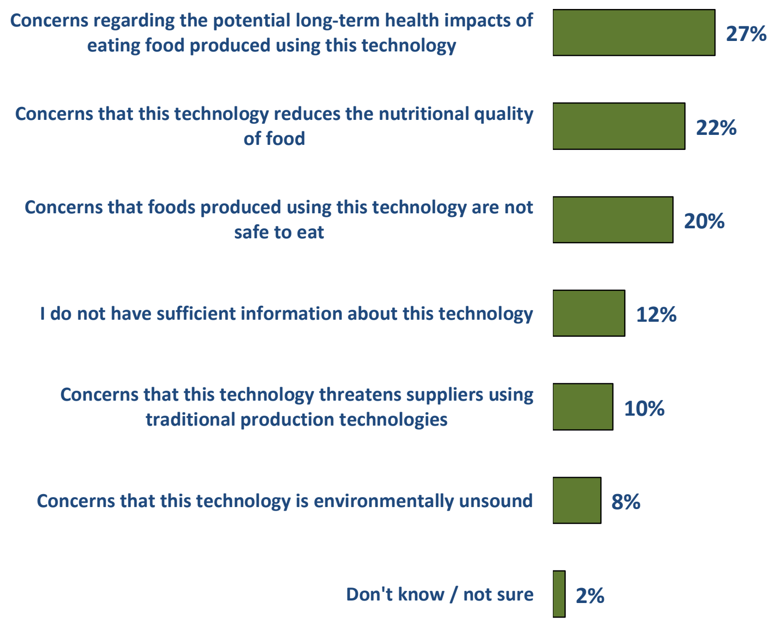
- Respondents from Western Provinces (33%; especially Alberta: 40%) compared to Quebec (17%);
- Young respondents (18-34; 39%) compared to older middle aged (45-54: 24%) and older

respondents (55+: 20%)

- Have children in household (38%) compared to those who do not (25%);
- In favour (52%) of irradiation compared to those against (11%);
- Excellent/good (31%) overall impression of food quality compared to average impressions (14%); and
- Confident (36%) in food safety compared to those only somewhat confident (18%).

The potential long-term health impacts of eating food produced using high-pressure processing (27%), potential reduction in nutritional quality of high-pressure processed food (22%) and whether high-pressure processed foods are safe to eat (20%) are the top concerns of those unlikely to purchase them.

One in three (27%) of those unlikely to purchase high-pressure processed foods are concerned with the potential for long-term health impacts

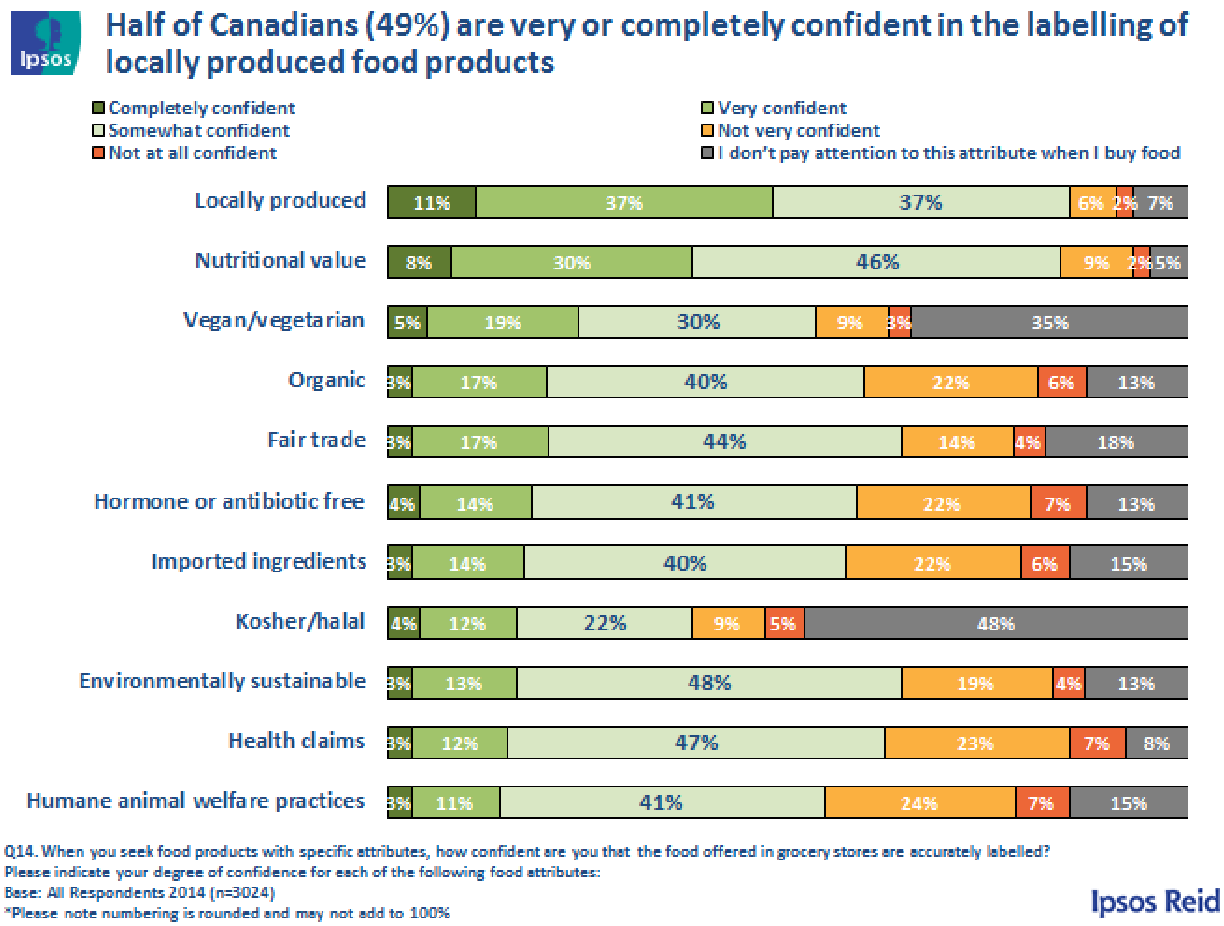


Q7C. You indicated that you would be somewhat or very unlikely to buy food produced using the following technologies. For each one, please indicate the most important reason for your reluctance to buy them:
Base: Hear of and unlikely to buy food produced using [High-pressure processing] technology 2014 (n=140)

Ipsos Reid

4.4 Assurance Systems

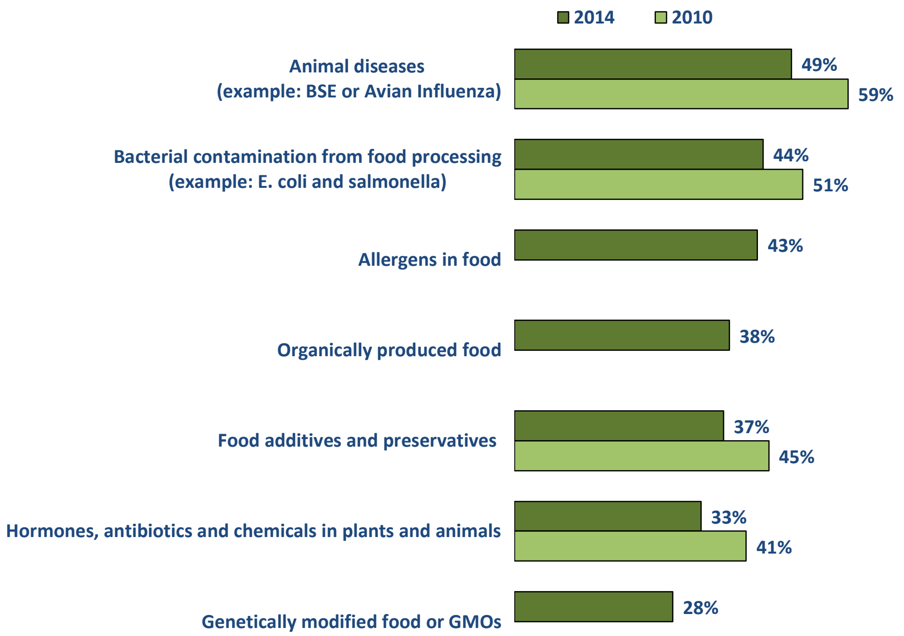
Respondents were asked to rate their confidence in the accuracy of labels for different food attributes of items found in the grocery store. Half (49%) are very or completely confident in the accuracy of labelling of locally produced items, two in five (37%) are very or completely confident in labelling of nutritional value.



Canadians don't pay attention to Kosher/halal (48%) or vegan/vegetarian (35%) attributes when purchasing foods, but few of those who do are not confident in food labeling (14% and 12% respectively).

Canadians are significantly less confident in the Canadian food system in terms of managing animal diseases (down 10 points from 2010), bacterial contamination (down 7 points from 2010), food additives (down 8 points from 2010) and hormones than in 2010 (down 8 points from 2010).

Half (49%) of Canadians are confident in the Canadian food system's management of concerns surrounding animal diseases



Q18. Thinking about food safety, how confident are you in the Canadian food system in terms of managing possible concerns about ....?
Base: All Respondents 2014 (n=3024); 2010 (n=3144); 2006 (n=1600)

Ipsos Reid

Those more likely to be very/somewhat confident in the management of **animal diseases** include:

- Middle household income (20K to under 60K: 50%; 60K to under 100K: 55%) compared to low income (under 20K: 42%);
- Speak English at home (51%) compared to French (46%);
- Seek locally produced food products (54%) compared to environmentally responsible production (51%), free range (49%) and organic food items (48%);
- Excellent/Good (55%) overall impression of food quality compared to average (22%); and
- Confident (64%) and somewhat confident (35%) in food safety compared to those who are unconfident (18%).

Those more likely to be very/somewhat confident in the management of **bacterial contamination from food processing** include:

- Respondents from Ontario (47%) compared to Saskatchewan (33%);
- Older middle aged respondents (45-54: 47%) compared to younger middle-aged (35-44: 39%);
- University degree (46%) compared to none (35%);
- Higher household income (60K to under 100K: 49%) compared to low (under 20K: 38%);

- Seek food items that are locally produced (46%) compared to free range (42%);
- In favour of irradiation (58%) compared to against (35%);
- Excellent/good (48%) overall impression of food quality compared to average (19%) and poor/very poor (9%); and
- Confident (58%) and somewhat confident (29%) in food safety compared to those who are unconfident (14%).

Those more likely to be very/somewhat confident in the management of **allergens in food** include:

- Young respondents (18-34: 49%) compared to middle aged (35-44: 42%) and older respondents (55+: 40%);
- University degree (45%), college/apprenticeship (44%) and high school (43%) compared to none (31%);
- High (100K or more: 46%) and middle household income (60K to under 100K: 50%; 20K to under 60K: 44%) compared to low (under 20K: 37%);
- Children in household (49%) compared to those without children in their households (42%);
- In favour of irradiation (56%) compared to against (40%);
- Excellent/good (48%) overall impression of food quality compared to poor/very poor (4%); and
- Confident (55%) and somewhat confident (31%) in food safety compared to unconfident (19%).

Those more likely to be very/somewhat confident in the management of **organically produced food** include:

- Middle household income (20K to under 60K: 41%; 60K to under 100K: 41%) compared to low income (under 20K: 32%);
- Seek organic (55%) food items, free range (49%) and environmentally responsible production (48%) of food items compared to locally produced (45%);
- In favour or irradiation (45%) compared to those against (38%);
- Excellent/good (41%) overall impression of food quality compared to average (18%) and poor/very poor (10%); and
- Confident (47%) in food safety compared to somewhat confident (27%) and unconfident (22%).

Those more likely to be very/somewhat confident in the management of **food additives and preservatives** include:

- Respondents from Atlantic Provinces (40%), Ontario (39%) and Quebec (39%) compared to Western Provinces (32%) and BC (30%);
- Older respondents (45-54: 42%; 55+: 39%) compared to younger middle aged (35-44: 35%);
- Higher household income of 60K to fewer than 100K (41%) compared to lower income of fewer than 20K (34%);
- Seek locally produced items (39%) and environmentally responsible production (38%) compared to free range (35%);
- In favour of irradiation (53%) compared to those against (26%);
- Excellent/good (42%) overall impression of food quality compared to average (13%) and poor/very poor (5%); and

- Confident (50%) and somewhat confident (22%) compared to unconfident (13%).

Those more likely to be very/somewhat confident in the management of **hormones, antibiotics and chemicals in plants and animals** include:

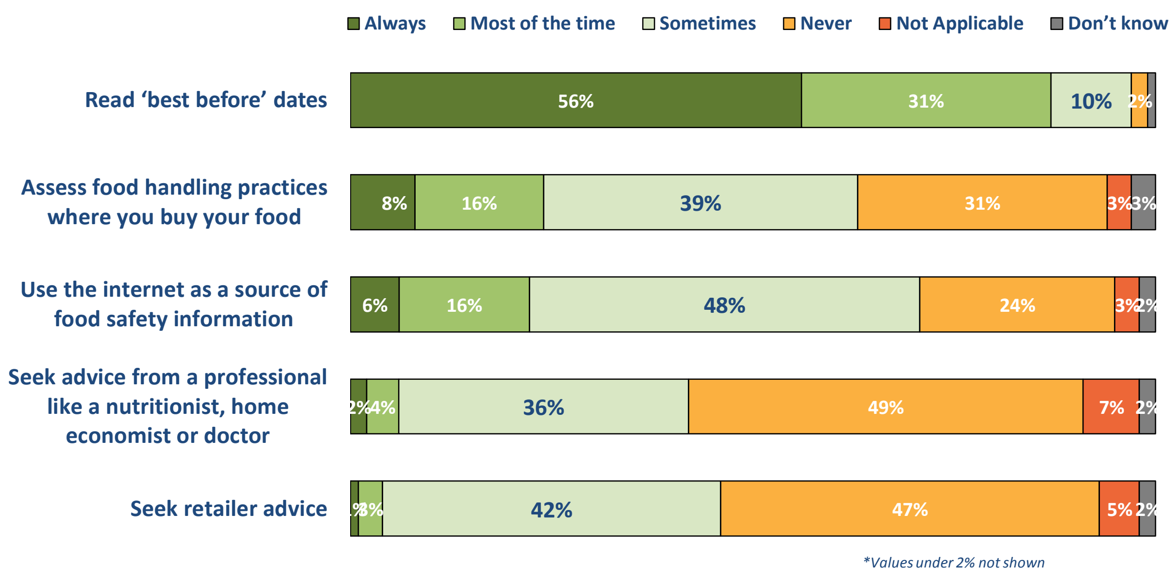
- Residents from Ontario (36%) compared to Alberta (28%);
- Older respondents (55+: 35%) compared to younger middle aged (35-44: 29%);
- High school (35%) compared to no formal education (none: 26%);
- High household income (100K or more: 36%) and middle (60K to under 100K: 38%; 20K to under 60K: 34%) compared to low (under 20K: 28%);
- In favour of irradiation (48%) compared to those against (25%);
- Excellent/good (37%) overall impression of food quality compared to average (12%) and poor/very poor (4%); and
- Confident (45%) in food safety and somewhat confident (20%) compared to those who are unconfident (9%).

Those more likely to be very/somewhat confident in the management of **genetically modified food or GMOs** include:

- Men (31%) compared to women (26%);
- Respondents from Atlantic Provinces (33%) and Ontario (31%) compared to Western Provinces (25%);
- High school (31%), college/ apprenticeship (29%) and university degree (29%) compared to no formal education (none: 19%);
- Higher household income (60K to fewer than 100K: 33%) compared to lower (under 20K: 25%);
- Have children in household (33%) compared to those without (27%);
- Seek locally produced food items (31%) and environmentally responsible production of food (31%) compared to free range (28%) and organic (27%);
- In favour of irradiation (43%) compared to those against (18%);
- Excellent/good (32%) overall impression of food quality compared to average (8%) and poor/very poor (4%); and
- Confident (39%) in food safety compared to somewhat confident (15%) and unconfident (12%).

Almost all (97%) Canadians at least sometimes look at 'best before' dates and just over half (56%) always read them. Nearly two thirds (63%) at least sometimes asses the food handling practices where they buy their food, but just 8% always do so. Seven in ten (70%) Canadians use the internet as a source of food safety information, while just under half (46%) seek retailer advice and two in five (42%) seek advice from a nutrition professional.

Most Canadians (87%) read 'best before' dates most of the time, while only a quarter (24%) assess the food handling practices where they buy food

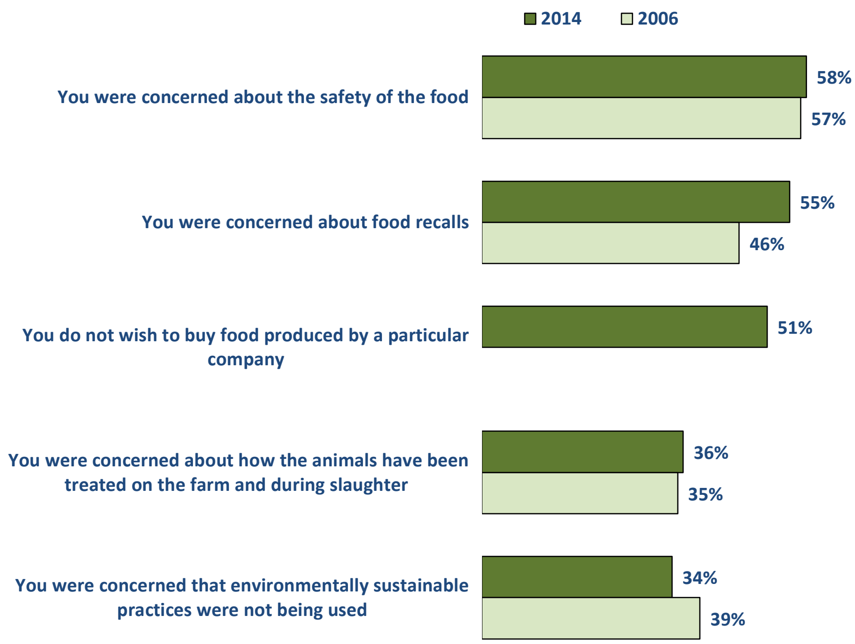


Q21. How often do you .....?
Base: All Respondents 2014 (n=3024)

Ipsos Reid

A sizeable proportion of Canadians have avoided or boycotted a particular food because they are, or at one time were, concerned about the safety of the food (58%), food recalls (55%) or a specific food company (51%). One in three has also boycotted a particular food item because they were concerned about animal treatment (36%) or that they were not using environmentally sustainable practices (34%). The number of Canadians who have avoided food products due to these issues is consistent with those asked in 2006.[1]

Three in five (58%) Canadians have avoided a particular food product because they were concerned about the safety of the food, over half because they were concerned about recalls (55%) or the company (51%)



Q20. Have you ever avoided or boycotted a particular food product because…
Base: All Respondents 2014 (n=3024); 2006 (n=1600)

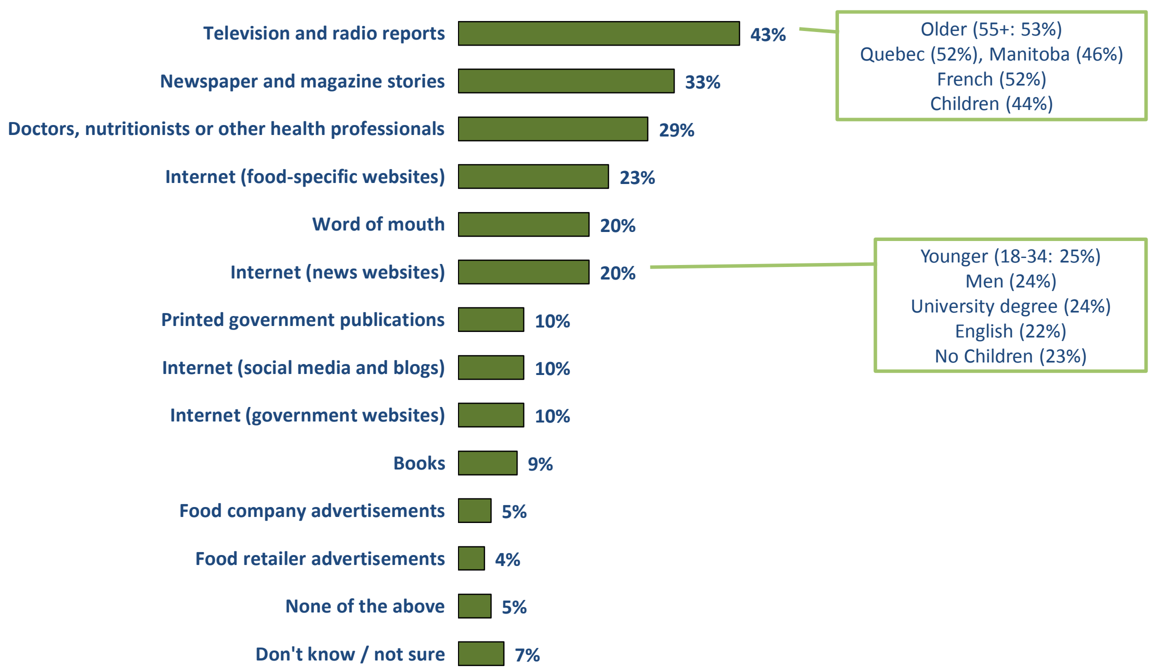
Ipsos Reid

[1] This question was not included in Wave 3 and has been compared to Wave 2 results.

4.5 Communication about Food and Nutrition Issues

Two in five Canadians rely on television and/or radio reports (43%) for information about food and nutrition issues, while one in three (33%) rely on newspaper and/or magazine stories. Only three in ten Canadians (29%) rely on doctors, nutritionists or other health professionals for information about food and nutrition.

Two in five (43%) Canadians rely on television and radio reports to learn about food and nutrition issues



Q10. What sources of information do you rely on most to learn about food and nutrition issues?
Base: All Respondents 2014 (n=3024)

Ipsos Reid

Those more likely to get information from **television and radio reports** (43%) include:

- Respondents from Quebec (52%) and Manitoba (46%) compared to Ontario (41%), BC (40%), Atlantic Provinces (36%) and Alberta (35%);
- Older (55+: 53%) and middle aged participants (45-54: 46%; 35-44:38.5%) compared to young respondents (18-34: 31%);
- High school level of education (47%) compared to university degree (41%);
- Middle household income (20K to under 60K:46%; 60K to under 100K: 45%) compared to lower income households (<20K: 37%) and higher income households (100K or more: 34%);
- French (52%) as language at home compared to English (40%) and other languages (33%);
- Have children in the household (44%) compared to those without (39%);
- Seek locally produced food items (47%) and environmental responsible production of food items (45%) compared to free range (39%) and organic (37%); and
- Excellent/Good (44%) overall impression of food quality compared to an average impression (34%).

Those more likely to get information from **newspaper and magazine stories** (33%) include:

- Women (35%) compared to men (31%);
- Respondents from Manitoba (38%), Quebec (38%), Ontario (34%) and BC (33%) compared to Alberta (25%), Saskatchewan (25%) and Atlantic Provinces (26%);
- Older participants (55+: 45%; 45-54: 30%) compared to younger participants (35-44: 27%; 18-34: 25%);
- University degree (37%) compared to college (31%) and those with none (27%);
- Middle and higher household income (60K to under 100K: 36%; 100K or more: 35%; and 20K to under 60K: 34%) compared to lower income households (<20K: 26%);
- Live in an urban area (34%) compared to rural (28%);
- Speak French at home (36%) compared to other languages (21%);
- Do not have children in their household (35%) compared to those that do (27%);
- Seek locally produced food items (39%) compared to free range (35%);
- Excellent/Good (36%) overall impression of food quality compared to an average impression (20%); and
- Are confident in food safety (35%) and somewhat confident (34%) compared to unconfident respondents (24%).

Those more likely to get information from **doctors, nutritionists or other health professionals** (29%) include:

- Women (33%) compared to men (26%);
- Respondents from BC (33%), Alberta (31%), and Ontario (30%) compared to Manitoba (22%);
- Older respondents (+55: 32%) compared to middle aged respondents (45-54: 27%);
- University degree (32%) and college (32%) compared to high school (24%);
- High household income of 100K or more (34%) compared to 60K to fewer than 100K (27%);
- Do not have children in their household (31%) compared to those that do (24%); and
- Seek organic food products (38%), environmentally responsible production (37%) and free range (37%) compared to locally produced foods (34%).

Those more likely to get information from **printed government publications** (10%) include:

- Respondents from Quebec (13%) compared to Ontario (10%), Western Provinces (9%) and BC (9%);
- Older respondents (55+: 14%; 45-54: 12%) compared to younger respondents (35-44: 7%; 18-34: 7%);
- High household income of 100K or more (14%) compared to 60K to fewer than 100K (9%);
- French spoken at home (14%) compared to English (10%);
- Seek locally produced food items (13%) and environmentally responsible products (13%) compared to organic (10%);
- In favour or irradiation (13%) compared to those against (9%); and
- Excellent/Good (12%) overall impression of the food quality compared to an average impression (4%).

Those more likely to get information from the **internet (government websites)** (10%) include:

- Young respondents (18-34: 13%) compared to older (55+: 8%);

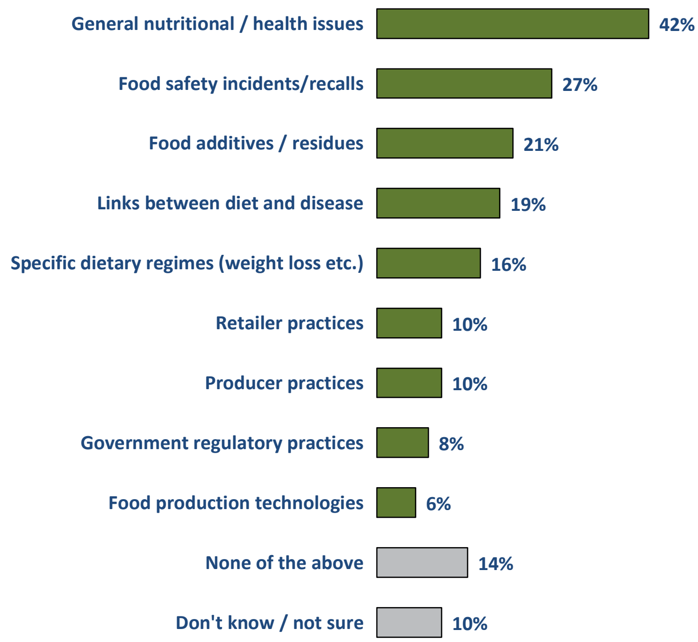
- University degree (14%) compared to those with college/apprenticeship (10%), high school degree (7%) and those with none (5%);
- High household income of 100K or more (14%) compared to low income of fewer than 20K (7%);
- In favour of irradiation (13%) compared to those against (8%);
- Excellent/Good (11%) overall impression of the food quality compared to average (7%); and
- Confident in food safety (12%) compared to those who are somewhat confident (9%).

Those more likely to get information from the **internet (news websites)** (20%) include:

- Men (24%) compared to women (16%);
- Respondents from Ontario (22%), Western Provinces (22%; especially Saskatchewan: 29%), BC (21%), and Atlantic Provinces (20%) compared to Quebec (13%);
- Young respondents (18-34: 25%) and middle-aged (35-44: 23%; 45-54: 20%) compared to older respondents (55+: 14%);
- Higher household income (100K or more: 25%; 60K to under 100K: 24%) compared to lower income (20K to under 60K: 19%; under 20K: 16%);
- Other languages spoken at home (36%) and English (22%) compared to French (11%);
- With children in household (23%) compared to those without (19%); and
- Seek organic food items (23%) compared to environmentally responsible production (20%), free range (20%) and locally produced (18%).

Over the past year, general nutritional and health issues most influenced two in five Canadians (42%) on their purchase decisions in the grocery store. Food safety incidents influenced just over a quarter of Canadians' purchase decisions.

Two in five (42%) Canadians were influenced by general nutritional and health issues when making purchase decisions at the grocery store



Q11. Over the past year, what kinds of information from most influenced your purchase decisions in the grocery store?
Base: All Respondents 2014 (n=3024)

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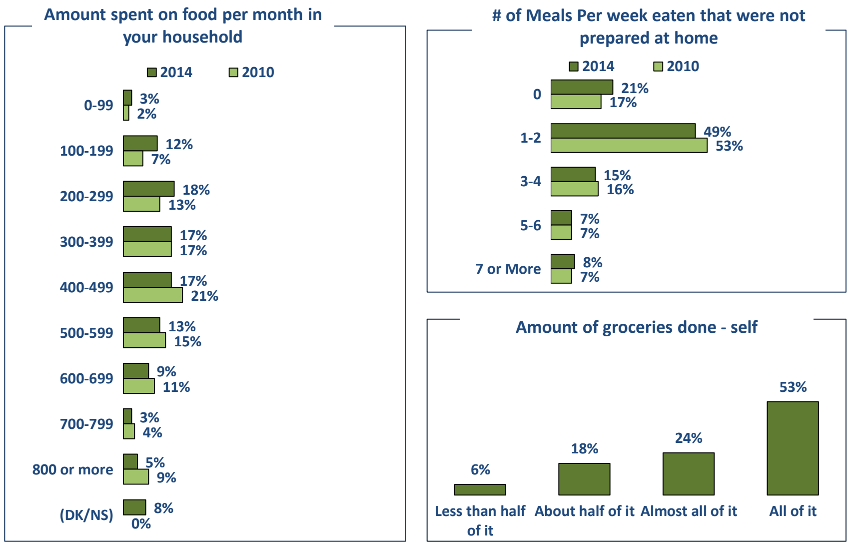
5 Appendix A: Respondent Demographics

Half of Canadians (49%) have eaten one or two meals that were not prepared at home in the past month



D1. On average, about how much do you spend on food per month in your household?
D2. In an average week, how many meals do you eat that were not prepared at home?
US01PGS. How much of your household's grocery shopping do you, yourself, do?
Base: All Respondents 2014 (n=3024); 2010 (n=3144)

Demographics

Gender	
Male	49%
Female	52%
Age	
18-34	28%
35-44	17%
45-54	20%
55+	35%

Province	
Alberta	11%
British Columbia	14%
Manitoba	3%
New Brunswick	2%
Newfoundland	2%
Nova Scotia	2%
Ontario	38%
Prince Edward Island	1%
Quebec	24%
Saskatchewan	3%

Children in Household	
0	81%
1	10%
2	7%
3	2%
4	1%
5	0%
Mean	0.3
Marital Status	
Single, never married	30%
Living with partner	13%
Married	40%
Widowed	4%
Divorced or separated	12%

Demographics

Language	
English	74%
French	24%
Other	4%
Prefer not to answer	1%

Ethnicity	
Visible Minority	10%
Other	90%

Employment Status	
Working full-time, that is, 35 or more hours per week?	37%
Working part-time, that is, less than 35 hours per week?	10%
Self-employed?	8%
Unemployed, but looking for work?	5%
A student attending school full-time?	5%
Retired?	23%
Not in the workforce?	8%
Other	3%
Prefer not to answer	2%

Education	
Some high school	5%
High School diploma or equivalent	24%
Registered Apprenticeship or other trades certificate or diploma	6%
College, CEGEP or other non-university certificate or diploma	25%
University certificate or diploma below bachelor's level	5%
Bachelor's degree	22%
Post graduate degree above bachelor's level	11%
Prefer not to answer	1%

Income	
Under $20,000	14%
$20,000 to just under $40,000	22%
$40,000 to just under $60,000	17%
$60,000 to just under $80,000	12%
$80,000 to just under $100,000	9%
$100,000 to just under $150,000	9%
$150,000 and above	3%
Prefer not to answer	14%

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6 Appendix B: Quantitative Research Instruments

6.3 English

Text page Introduction to identify GoC as client - Required

Dear Participant:

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

Ipsos 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 **[insert incentive]** as a token of our appreciation.

Screener Questions

YEAR/MONTH. What is your date of birth (year and month)?

(Select one answer)

- Use YEAR/MONTH response list.

QUOTAGERANGE. (HIDDEN) Age breaks

(Select one answer)

- (_18_34) 18-34
- (_35_44) 35-44
- (_45_54) 45-54
- (_55+) 55+

RESP_AGE. (HIDDEN) Age

(Select one answer)

[PN: Terminate if under 18]

- Use RESP_AGE response list.

RESP_GENDER. What is your gender?

(Select one answer)

- (_1) Male
- (_2) Female

US01PGS. How much of your household's grocery shopping do you, yourself, do?
(Select one answer)
[PN: Terminate if codes _5]
(_1) All of it
(_2) Almost all of it
(_3) About half of it
(_4) Less than half of it

(_5) None [TERMINATE]

CAPOST1. What is your postal code? (example: A8A8A8)

(Enter text)

SCREAD. Which of the following types of media activities have you participated in within the last 30 days?

(Select as many answers as apply)

- ☐ (_1) Playing Video Games (online, console, phone or other)
- ☐ (_2) Reading magazines
- ☐ (_3) Reading newspapers
- ☐ (_4) Listening to an MP3 player/iPod
- ☐ (_5) Listening to the radio
- ☐ (_6) Listening to Satellite Radio
- ☐ (_7) Watching movies in a theater
- ☐ (_8) Watching movies at home
- ☐ (_9) Watching TV on a regular TV
- ☐ (_10) Watching TV on a High Definition (HD) TV
- ☐ (_11) None of the above [Exclusive]

HHCMP10. How many people are living or staying at your current address? (Include yourself and any other adults or children who are currently living or staying at this address for at least two months)

(Select one answer)

- ○ (_1) 1
- ○ (_2) 2
- ○ (_3) 3
- ○ (_4) 4
- ○ (_5) 5
- ○ (_6) 6
- ○ (_7) 7
- ○ (_8) 8
- ○ (_9) 9
- ○ (_10) 10
- ○ (_11) 11
- ○ (_12) 12+

HHCMP20. Please answer the following for each of the people who live with you: Enter 0 if the child in your household is under 1 year old.

(Select one answer)

- ○ Use HHCMP20 response list.

USHHI2. Please indicate your annual household income before taxes.

(Select one answer)

- ○ Use USHHI2 response list.

USMAR2. What is your marital status?

(Select one answer)

- (_1) Single, never married
- (_2) Living with partner
- (_3) Married
- (_4) Widowed
- (_5) Divorced or separated

CAETHN2. Sometimes people identify themselves with a specific ethnicity or cultural background which is different from their citizenship or nationality. Thinking about your own identity in ethnic or cultural terms, please select which group you most identify yourself with.

(Select one answer)

- Use CAETHN2 response list.

US32EMP. Which of the following best describes your employment status?

(Select one answer)

- (_1) Employed - full-time
- (_2) Employed - part-time
- (_3) Self-Employed - full-time
- (_4) Self-Employed - part-time
- (_5) Retired
- (_6) Student - full-time
- (_7) Student - part-time
- (_8) Military
- (_9) Full-time parent, homemaker
- (_10) Not currently employed
- (_11) Prefer not to answer

ATTRIBUTE IMPORTANCE SECTION

Q1. 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.

[Tracking – From Q3 in 2010 Survey]

[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 (or other animal welfare concern)

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

Q2. 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.

[Tracking - From Q4 in 2010 Survey]

[COLUMN HEADER: Features which are deal breakers]
[ONLY SHOW ITEMS WITH ALWAYS SELECTED IN Q1, MULTI-PUNCH DO NOT SHOW CATEGORY TITLES]

ORGANIC SECTION

[IF Q1 "OFTEN/ALWAYS/SOMETIMES" SELECTED FOR "ORGANIC PRODUCTION" ASK Q3A]

Q3A. You mentioned that you look for organically produced foods when grocery shopping or dining away from home. Thinking of when you go grocery shopping, how frequently to you purchase organically produced products?

[SCALE – TO APPEAR AS COLUMNS]

- Always
- Often
- Sometimes
- Rarely
- Never

[IF Q3A "OFTEN/ALWAYS/SOMETIMES" ASK Q3B/C/D]

Q3B In your opinion what is the most important benefit of organic foods?

[Similar to Q5A from 2010 Questionnaire]

[LIST-SELECT ONE ONLY – RANDOMIZE]

- ○ Support the local economy
- ○ Product is fresher
- ○ Product is tastier
- ○ Product is safer
- ○ Product is healthier
- ○ Product has less of an environmental impact
- ○ Product has a lower price
- ○ Ethical / moral benefits
- ○ Other: **[Please specify]**

Q3C. 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 organically produced".

[Similar to Q5D from 2010 Questionnaire]

- ○ Strongly agree
- ○ Somewhat agree
- ○ Neither agree nor disagree
- ○ Somewhat disagree
- ○ Strongly disagree

Q3D. How do you determine whether a particular product is "organic" or not?

[SELECT ALL THAT APPLY]

(Please select all that apply)

- ☐ The label says "Canadian Organic"
- ☐ The label includes the Canadian Organic logo
- ☐ The label includes the word organic
- ☐ The label says that the product is "certified" organic by an independent body
- ☐ The retailer indicates that the product is organically produced
- ☐ I buy directly from a farmer who follows organic practices

- ☐ Other: **[Please specify]**
- ☐ Don't know/not sure

[IF Q3A "RARELY/NEVER" ASK Q3E/F]
[IF Q1 "RARELY/NEVER" SELECTED FOR "ORGANIC PRODUCTION" ASK Q3E/F]

Q3E. What are your main reasons for not purchasing food products labelled as "organic"?

[Similar to Q5E from 2010 Questionnaire]

(Please select all that apply)

[LIST – ALL THAT APPLY - RANDOMIZE]

- ☐ Not generally available where I shop
- ☐ Too expensive
- ☐ Not discernible or different from other products
- ☐ Lower quality (blemishes, inconsistent appearance)
- ☐ I do not understand the benefits of organic products
- ☐ I am not confident that these products are really produced organically
- ☐ I don't see value in these products
- ☐ Other: **[Please specify]**

Q3F. Would any of the following measures motivate you to purchase more organically-produced food products?

(Please select all that apply)

[LIST – ALL THAT APPLY - RANDOMIZE]

- ☐ Certification of organic production methods by a government agency
- ☐ Certification of organic production methods by an industry association
- ☐ Certification of organic production methods by an independent authority
- ☐ Certification of organic production methods by the retailer
- ☐ Lower price
- ☐ Greater availability
- ☐ Information about the benefits of organic products
- ☐ Other: **[Please specify]**

LOCALLY PRODUCED SECTION

[IF Q1 "OFTEN/ALWAYS/SOMETIMES" SELECTED FOR "LOCALLY PRODUCED" ASK Q4A]

Q4A. You mentioned that you look for locally produced foods when grocery shopping or dining away from home. Thinking of when you go grocery shopping, how frequently to you purchase locally produced products?

[Similar to Q6B from 2010 Questionnaire]

[SCALE – TO APPEAR AS COLUMNS]

- ☐ Always
- ☐ Often
- ☐ Sometimes
- ☐ Rarely
- ☐ Never

[IF Q4A "OFTEN/ALWAYS/SOMETIMES" ASK Q4B/C/D]

Q4B. In your opinion what is the most important benefit of locally produced foods?

[Similar to Q6A from 2010 Questionnaire]

[LIST – SELECT ONLY ONE - RANDOMIZE]

- ○ Support the local economy
- ○ Product is fresher
- ○ Product is tastier
- ○ Product is safer
- ○ Product is healthier
- ○ Product has less of an environmental impact
- ○ Product has a lower price
- ○ Ethical / moral benefits
- ○ Other: **[Please specify]**

Q4C. 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".

[Tracking – Q6C from 2010 Questionnaire]

- ○ Strongly agree
- ○ Somewhat agree
- ○ Neither agree nor disagree
- ○ Somewhat disagree
- ○ Strongly disagree

Q4D. How do you determine whether a particular product is locally produced or not?

Select all that apply

- ☐ The label specifies the location of the farm or processing company that the food came from
- ☐ The label specifies a farm or processing company that I know to be local
- ☐ The retailer indicates that the product is locally produced
- ☐ The label includes words like "natural"
- ☐ I buy directly from local farmers
- ☐ Other: **[Please specify]**

[IF Q4A "RARELY/NEVER" ASK Q4E/F]
[IF Q1 "RARELY/NEVER" SELECTED FOR "LOCALLY PRODUCED" ASK Q4E/F]

Q4E. What are your main reasons for not purchasing products labelled as "local"?

[Similar to Q6E from 2010 Questionnaire]

(Please select all that apply)

[LIST – ALL THAT APPLY - RANDOMIZE]

- ☐ Not generally available where I shop
- ☐ Too expensive
- ☐ Not discernable or different from other products
- ☐ Lower quality (blemishes, inconsistent appearance)
- ☐ I do not understand the benefits of locally-produced products
- ☐ I am not confident that these products are really produced locally
- ☐ I don't see value in these products
- ☐ Other: **[Please specify]**

Q4F. Would any of the following measures would you to purchase more locally-produced food products?

(Please select all that apply)

[LIST – ALL THAT APPLY - RANDOMIZE]

- ☐ Certification of local production methods by a government agency
- ☐ Certification of local production methods by an industry association
- ☐ Certification of local production methods by an independent authority
- ☐ Certification of local production methods by the retailer
- ☐ Lower price
- ☐ Greater availability
- ☐ Information about the benefits of local products
- ☐ Other: specify

EVIRONMENTAL SUSTAINABILITY SECTION

[IF Q1 "OFTEN/ALWAYS/SOMETIMES" SELECTED FOR "ENVIRONMENTALLY RESPONSIBLE PRODUCT" ASK Q5A]

Q5A. You mentioned that you look for environmentally responsible products when grocery shopping or dining away from home. Thinking of when you go grocery shopping, how frequently do you purchase environmentally sustainable products?

[SCALE – TO APPEAR AS COLUMNS]

- Always
- Often
- Sometimes
- Rarely
- Never

[IF Q5A "OFTEN/ALWAYS/SOMETIMES" ASK Q5B/C/D]

Q5B. In your opinion what is the most important benefit of foods produced using environmentally sustainable methods?

[LIST-SELECT ONE ONLY – RANDOMIZE]

- ○ Support the local economy
- ○ Product is fresher
- ○ Product is tastier
- ○ Product is safer
- ○ Product is healthier
- ○ Product has less of an environmental impact
- ○ Product has a lower price
- ○ Ethical / moral benefits
- ○ Other: specify

Q5C. 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 environmentally sustainable".

- Strongly agree
- Somewhat agree
- Neither agree nor disagree
- Somewhat disagree
- Strongly disagree

Q5D. How do you determine whether a particular product is environmentally sustainable or not? **[Select all that apply]**

(Please select all that apply)

- ☐ The label makes a claim of environmental benefit
- ☐ The label indicates that the product is “certified” by an independent body (e.g. “Marine Stewardship Council” or “Ocean Wise”)
- ☐ The retailer indicates that the product is environmentally sustainable
- ☐ The label specifies a farm or company that I know follows environmentally-sustainable practices
- ☐ Other: specify

[IF Q5A “RARELY/NEVER” ASK Q5E/F]

[IF Q1 “RARELY/NEVER” SELECTED FOR “ENVIRONMENTALLY RESPONSIBLE PRODUCT” ASK Q5E/F]

Q5E. What are your main reasons for not purchasing food products labelled as produced using sustainable methods?

(Please select all that apply)

[LIST – ALL THAT APPLY - RANDOMIZE]

- ☐ Not generally available where I shop
- ☐ Too expensive
- ☐ Not discernable or different from other products
- ☐ Lower quality (blemishes, inconsistent appearance)
- ☐ I do not understand the benefits of environmentally-sustainable production
- ☐ I am not confident that these products are really produced using environmentally sustainable methods
- ☐ I don’t see value in these products
- ☐ Other: specify

Q5F. Would any of the following measures motivate you to purchase more products produced using sustainable methods?

(Please select all that apply)

[LIST – ALL THAT APPLY - RANDOMIZE]

- ☐ Certification of sustainable production methods by a government agency
- ☐ Certification of sustainable production methods by an industry association
- ☐ Certification of sustainable production methods by an independent authority
- ☐ Certification of sustainable production methods by the retailer
- ☐ Lower price
- ☐ Greater availability
- ☐ Information about the benefits of environmentally-sustainable production
- ☐ Other: specify

ANIMAL WELFARE SECTION

[IF Q1 "OFTEN/ALWAYS/SOMETIMES" SELECTED FOR "FREE RANGE" ASK Q6A]

Q6A. You mentioned that you look for free range products when grocery shopping or dining away from home. Thinking of when you go grocery shopping, how frequently do you purchase products described as free range or produced under other conditions related to the treatment of animals?

[SCALE – TO APPEAR AS COLUMNS]

- Always
- Often
- Sometimes
- Rarely
- Never

[IF Q6A "OFTEN/ALWAYS/SOMETIMES" ASK Q6B/C/D]

Q6B. In your opinion what is the most important benefit of animal-based foods described as free range or produced under other conditions related to the treatment of animals?

[LIST-SELECT ONE ONLY – RANDOMIZE]

- ○ Support the local economy
- ○ Product is fresher
- ○ Product is tastier
- ○ Product is safer
- ○ Product is healthier
- ○ Product has less of an environmental impact
- ○ Product has a lower price
- ○ Ethical / moral benefits
- ○ Other: specify

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 animal-based foods described as free range or produced under other conditions related to the treatment of animals?

- Strongly agree
- Somewhat agree
- Neither agree nor disagree
- Somewhat disagree
- Strongly disagree

Q6D. How do you determine whether a particular animal-based food is actually free range or produced under other conditions related to the treatment of animals?

(Please select all that apply)

[SELECT ALL THAT APPLY]

- ☐ The label makes a claim such as "free range" or "traditionally raised"
- ☐ The label indicates that the product is "certified" by an independent body (e.g. Humane Society)
- ☐ The retailer indicates that the product has been produced under humane animal welfare conditions

- ☐ The label specifies a farm or processing company that I know follows humane animal welfare practices
- ☐ Other: specify

[IF Q6A "RARELY/NEVER" ASK Q6E/F]

[IF Q1 "RARELY/NEVER" SELECTED FOR "FREE RANGE" ASK Q6E/F]

Q6E. What are your main reasons for not purchasing products described as free range or produced under other conditions related to the treatment of animals?

(Please select all that apply)

[LIST – ALL THAT APPLY - RANDOMIZE]

- ☐ Not generally available where I shop
- ☐ Too expensive
- ☐ Not discernable or different from other products
- ☐ Lower quality (blemishes, inconsistent appearance)
- ☐ I do not understand the benefits of food produced under humane animal welfare conditions
- ☐ I am not confident that these products are really produced under humane animal welfare conditions
- ☐ I don't see value in these products
- ☐ Other: specify

Q6F. Would any of the following measures motivate you to purchase more animal products described as free range or produced under other conditions related to the treatment of animals?

(Please select all that apply)

[LIST – ALL THAT APPLY - RANDOMIZE]

- ☐ Certification of humane production methods by a government agency
- ☐ Certification of humane production methods by an industry association
- ☐ Certification of humane production methods by an independent authority
- ☐ Certification of humane production methods by the retailer
- ☐ Lower price
- ☐ Greater availability
- ☐ Information about the benefits of animal-based food produced under humane animal welfare conditions
- ☐ Other: specify

FOOD TECHNOLOGIES SECTION

Q7A. The next few questions relate to the use of new and/or advanced technologies to produce food products. Please indicate whether you are familiar with the following food-production technologies

[SCALE – TO APPEAR AS COLUMNS]

- 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

[LIST - RANDOMIZE]

Irradiation
Animal biotechnology
Genetic engineering
Nanotechnology
High-pressure processing

[FOR EACH TECHNOLOGY, IF Q7A "HEARD OF IT AND KNOW LITTLE/LOT ABOUT IT" ASK Q7B]

Q7B. You indicated that you know at least a little about the following technologies. How likely would you be to buy food that was produced using these technologies?

[SCALE – TO APPEAR AS COLUMNS]

- Very likely
- Somewhat likely
- Neutral
- Somewhat unlikely
- Very unlikely
- Don't know/not sure

[LIST - RANDOMIZE]

- ☐ Irradiation
- ☐ Animal biotechnology
- ☐ Genetic engineering
- ☐ Nanotechnology
- ☐ High-pressure processing

[FOR EACH TECHNOLOGY, IF Q7B "SOMEWHAT/VERY UNLIKELY" ASK Q7C]

Q7C. You indicated that you would be somewhat or very unlikely to buy food produced using the following technologies. For each one, please indicate the most important reason for your reluctance to buy them:

[DROPDOWN GRID : MENU]

- ☐ Concerns that this technology is environmentally unsound
- ☐ Concerns that foods produced using this technology are not safe to eat
- ☐ Concerns regarding the potential long-term health impacts of eating food produced using this technology
- ☐ Concerns that this technology reduces the nutritional quality of food
- ☐ Concerns that this technology threatens suppliers using traditional production technologies
- ☐ I do not have sufficient information about this technology
- ☐ Don't know / not sure

[LIST DOWN - RANDOMIZE]

- ☐ Irradiation
- ☐ Animal biotechnology
- ☐ Genetic engineering
- ☐ Nanotechnology
- ☐ High-pressure processing

FOOD SAFETY AND QUALITY SECTION

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

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

[Tracking From Q8 in 2010 Questionnaire]

[LIST – SELECT ONE ONLY]

- ○ Excellent quality
- ○ Good quality
- ○ Average quality
- ○ Poor quality
- ○ Very poor quality

Q9. How confident are you that food produced in Canada is safe? Are you...

[Tracking from Q9 in 2010 Questionnaire]

[LIST – SELECT ONE ONLY]

- ○ Completely confident
- ○ Very confident
- ○ Somewhat confident
- ○ Not very confident
- ○ Not at all confident

Q10. What sources of information do you rely on most to learn about food and nutrition issues?

(Please select up to three)

[SELECT UP TO THREE]

- ☐ Newspaper and magazine stories
- ☐ Television and radio reports
- ☐ Books
- ☐ Doctors, nutritionists or other health professionals
- ☐ Internet (social media and blogs)
- ☐ Internet (food-specific websites)
- ☐ Internet (news websites)
- ☐ Internet (government websites)
- ☐ Word of mouth
- ☐ Food company advertisements
- ☐ Food retailer advertisements
- ☐ Printed government publications
- ☐ None of the above
- ☐ Don't know / not sure

Q11. Over the past year, what kinds of information from most influenced your purchase decisions in the grocery store?

(Please select up to three)

[SELECT UP TO THREE]

- ☐ Food safety incidents/recalls
- ☐ General nutritional / health issues
- ☐ Food additives / residues
- ☐ Food production technologies
- ☐ Retailer practices
- ☐ Producer practices
- ☐ Government regulatory practices
- ☐ Links between diet and disease
- ☐ Specific dietary regimes (weight loss etc.)
- ☐ None of the above
- ☐ Don't know / not sure

Q12A. Irradiation is a process that uses ionizing radiation as a food safety measure to reduce the levels of bacteria that cause food poisoning and food spoilage. Please indicate your feelings about it on the scale below

- Strongly in favour
- Somewhat in favour
- Neither in favour nor against
- Somewhat against
- Strongly against
- Don't know

Q12B. If you know that **[STATEMENT FROM LIST]**, how would this make you feel regarding the use of this process?

- Much more positively
- Somewhat more positively
- About the same
- Somewhat more negatively
- Much more negatively

[LIST – RANDOMIZE]

- ○ Irradiation can improve the safety of food by reducing the risk of food poisoning
- ○ Irradiation can improve the shelf life of food by reducing spoilage
- ○ The long term health effects of eating irradiated foods are unknown

---

Q12C. Please indicate whether you agree or disagree with the following statements about food irradiation.

- ○ I am concerned about the safety of irradiated food products
- ○ I am concerned about the safety of the irradiation process
- ○ I think food that has been irradiated should be labelled as such

[GRID]

- Strongly agree
- Somewhat agree
- Neither agree nor disagree
- Somewhat disagree
- Strongly disagree

Q13A. Which of the following would make you feel more confident about purchasing irradiated foods?

[MULTI PUNCH LIST – RANDOMIZE]

- ☐ Assurance from an independent group of scientists that irradiated food is safe to eat
- ☐ Assurance from government scientists that irradiated food is safe to eat
- ☐ Certification of the safety of irradiation methods and facilities by an independent authority
- ☐ Certification of the safety of irradiation methods and facilities by a government authority
- ☐ Information about the safety and shelf life benefits of irradiated food
- ☐ Information about the health impacts of eating irradiated food
- ☐ Other: Specify

Q13B. Would you consider the purchase of irradiated foods under any of the following conditions?

[LIST – SELECT ALL THAT APPLY RANDOMIZE]

- ☐ I would consider the purchase of irradiated foods under any circumstances **[EXCLUSIVE]**
- ☐ If an independent group of scientists evaluated irradiation technology and concluded that it improves food safety and is at least as safe and nutritious as non-irradiated alternatives
- ☐ If government scientists evaluated irradiation technology and concluded that it improves food safety and is at least as safe and nutritious as non-irradiated alternatives
- ☐ If all irradiated foods were labelled as such so that consumers could make their own choices
- ☐ I would not consider the purchase of irradiated foods under any circumstances **[EXCLUSIVE]**
- ☐ Other: Specify

ASSURANCE SYSTEMS SECTION

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

Q14. When you seek food products with specific attributes, how confident are you that the food offered in grocery stores are accurately labelled? Please indicate your degree of confidence for each of the following food attributes:

[SCALE]

- Completely confident
- Very confident
- Somewhat confident
- Not very confident
- Not at all confident
- I don't pay attention to this attribute when I buy food

[LIST – RANDOMIZE]

- ☐ Locally produced
- ☐ Environmentally sustainable
- ☐ Nutritional value
- ☐ Health claims
- ☐ Humane animal welfare practices
- ☐ Fair trade
- ☐ Kosher/halal
- ☐ Organic
- ☐ Vegan/vegetarian
- ☐ Imported ingredients
- ☐ Hormone or antibiotic free

Q15. When you seek food products with specific attributes (such as organic or local), what actions by industry or government would improve your confidence that food products offered in grocery stores are accurately labelled?

[MULTI PUNCH CHOICES]

- Certification by a government agency
- Certification by an independent auditor
- Certification by the producer
- Certification by an industry association
- Other
- I don't pay attention to this attribute when I buy food [EXCLUSIVE]

[LIST – RANDOMIZE]

- ☐ Locally produced
- ☐ Environmentally sustainable
- ☐ Nutritional value
- ☐ Health claims
- ☐ Humane animal welfare practices
- ☐ Fair trade
- ☐ Kosher/halal
- ☐ Organic
- ☐ Vegan/vegetarian
- ☐ Imported ingredients
- ☐ Hormone or antibiotic free

Q16. When you seek food products with specific attributes, what action do you take if you are unsure about whether a food product in a grocery store is accurately labelled?

[SINGLE PUNCH CHOICES]

- Buy it anyway if products with more credible attribute claims are not available
- Buy it only if the price is not higher than similar products making no attribute claims
- Ask the retailer to verify the attribute claims
- Seek the product in a different food store
- Buy an alternative food product
- Other
- I don't pay attention to this attribute when I buy food

[LIST – RANDOMIZE]

- ☐ Locally produced
- ☐ Environmentally sustainable
- ☐ Nutritional value
- ☐ Health claims
- ☐ Humane animal welfare practices
- ☐ Fair trade
- ☐ Kosher/halal
- ☐ Organic
- ☐ Vegan/vegetarian
- ☐ Imported ingredients
- ☐ Hormone or antibiotic free

Q17A. Which of the following devices do you use regularly to learn about food attributes and nutritional value?

[LIST – ALL THE APPLY – RANDOMIZE]

- ☐ Desktop computer
- ☐ Laptop
- ☐ Tablet
- ☐ Smartphone
- ☐ Other mobile computer or device
- ☐ None of the above

Q17B. Have you ever used a mobile phone or handheld device to scan a barcode (including 'QR' or '2D' barcodes) for a retail product?

[GRID ACROSS]

- Yes
- No

[GRID DOWN]

- ☐ On package or shelf labels in a food store
- ☐ On package or shelf labels in another type of store
- ☐ On posters or display advertising
- ☐ On printed advertisements or articles in newspapers or magazines

Q18. Thinking about food safety, how confident are you in the Canadian food system in terms of managing possible concerns about ….?

[Tracks to Q20 in 2010 and Q11 from 2006]

[RESPONSES – SHOW AS COLUMNS]

- Very Confident
- Somewhat confident
- Neutral
- Not very confident
- Not at all confident
- I don't pay attention to this attribute when I buy food

[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)
- ☐ Genetically modified food or GMOs
- ☐ Hormones, antibiotics and chemicals in plants and animals
- ☐ Organically produced food
- ☐ Allergens in food

PERSONAL CHARACTERISTICS SECTION

Q19. Please indicate whether you agree or disagree with the following statements (on a scale of 1=strongly disagree to 7=strongly agree)

[Tracks to Q23 from 2006]

[SCALE]

- Strongly disagree 1
- 2
- 3
- 4
- 5
- 6
- Strongly agree 7
- Don't know / not sure

[RESPONSES] +*

- I have control over what's in the food I buy
- I spend time worrying about the safety of the food I eat
- I am very particular about food quality, and only buy the best that I can afford
- I am very careful about the way I store and prepare food
- I have separate cutting boards for raw meats and vegetables
- As long as I reheat them thoroughly, it doesn't matter how long I store leftovers in the fridge
- I throw out food that is past the expiry date
- I have asked my retailer for advice on food quality or safety
- I buy organic food products only if they are certified organic
- I am the main person responsible for preparing food at home
- I have thought about my grocery store's practices in the way they handle food
- Whenever possible, I eat food that is locally produced
- I read the nutrition facts table to make food purchase decisions
- I read the ingredients list to make food purchase decisions
- I read the diet/health-related claims to make food purchase decisions
- I would be willing to pay more for premium quality foods

Q20. Have you ever avoided or boycotted a particular food product because…

[Tracks to Q25 from 2006]

- Yes
- No

- You were concerned about the safety of the food
- You were concerned about how the animals have been treated
- You were concerned that environmentally sustainable practices have not been followed
- You do not wish to buy food produced by a particular company
- You were concerned about food recalls
- Other, specify **[AUTO SELECT YES IF RESPONSE TYPED INTO BOX]**

Q21. How often do you …..?

[Tracks to Q13 from 2006]

[SCALE]

- Always
- Most of the time
- Sometimes
- Never
- Not Applicable
- Don't know / not sure

[CATEGORIES]

- Read 'best before' dates
- Seek retailer advice
- Seek advice from a professional like a nutritionist, home economist or doctor
- Use the internet as a source of food safety information
- Assess food handling practices where you buy your food

Q22. In the past year have you changed your food purchasing habits regarding ….

[Tracks to Q14 from 2006]

[SCALE]

- Yes
- No
- Don't know / not sure

[CATEGORIES]

- Safety
- Quality
- Diet/health

Demographic Questions

D1. On average, about how much do you spend on food per month in your household?

[Tracking 2010]

[RANGE IN $ 0-99999]

D2. In an average week, how many meals do you eat that were not prepared at home?

[Tracking 2010]

[RANGE 0 to 50]

D3. What language do you speak most often at home? **[ACCEPT ALL THAT APPLY]**

[GoC standard]

- ☐ English
- ☐ French
- ☐ Other **[SPECIFY]**
- ☐ Prefer not to answer

D4. Which of the following categories best describes your current employment status? Are you...

[ACCEPT ONE ANSWER ONLY]

[Tracking from Q39 2010 and GoC standard]

- ○ 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, NOT LOOKING FOR WORK]**
- Other **[DO NOT SPECIFY]**
- Prefer not to answer

D5. What is the highest degree or level of school you have completed? (If currently enrolled, select the previous grade or highest degree received.) (Select one)

[Tracking GoC standard]

- Grade 8 or less
- Some high school
- High School diploma or equivalent
- Registered Apprenticeship or other trades certificate or diploma
- College, CEGEP or other non-university certificate or diploma
- University certificate or diploma below bachelor's level
- Bachelor's degree
- Post graduate degree above bachelor's level
- Prefer not to answer

6.4 French

Perceptions des consommateurs à l'égard des aliments

Étude de suivi 2014 – Vague 4

Ébauche de questionnaire en ligne

Cher participant,
Au nom de l'équipe du panel Ipsos Je-Dis et d'Ipsos, nous tenons à vous remercier de prendre part à notre étude de marché.
[TO BE INCLUDED ON INTRO PAGE]
Ipsos a été mandatée par le gouvernement du Canada pour mener une étude visant à comprendre les attitudes et les perceptions à l'égard de la salubrité et de la qualité des aliments. Il vous faudra environ **18 à 20 minutes** pour répondre au sondage et votre participation est grandement appréciée. Par ailleurs, n'oubliez pas que votre participation à cette étude est volontaire et entièrement confidentielle. Si vous êtes admissible et que vous répondez à toutes les questions du sondage, vous recevrez une somme de (insérer le montant) en guise de remerciement.

IMPORTANCE DES CARACTÉRISTIQUES

Q1. [TRACKING] Voici quelques caractéristiques de produits en particulier que vous pouvez ou non rechercher lorsque vous faites vos achats d'épicerie ou lorsque vous mangez à l'extérieur de la maison. Sur l'échelle ci-dessous, veuillez indiquer à quelle fréquence vous recherchez des aliments possédant chacune des caractéristiques suivantes.
[SCALE – TO APPEAR AS COLUMNS]
Toujours
Souvent
Parfois
Rarement
Jamais
[LIST – RANDOMIZE ORDER OF ENTIRE LIST, DO NOT SHOW CATEGORY TITLES]

ORIGINE/CATÉGORIE DE LA MARQUE
Produit localement
Produit du Canada ou *Fabriqué au Canada* sur l'étiquette
Réputation de la marque/source du produit
Quantité d'ingrédients importés
Pays d'origine
CARACTÉRISTIQUES DU PRODUIT
La meilleure qualité qui soit
Le meilleur rapport qualité-prix
Valeur nutritive
Aspect pratique
Allégations relatives aux effets sur la santé
CARACTÉRISTIQUES ÉTHIQUES/DE PRODUCTION
Production responsable au plan de l'environnement
Production biologique
Élevage en liberté
Alimentation des animaux (c.-à-d. nourris d'herbe ou de grains) – produits de viande seulement
Commerce équitable
Sans hormones ni antibiotiques – produits de viande seulement
NORMES ETHNIQUES/DE VIE
Halal
Cacher
Végétalien
Végétarien, mais pas nécessairement végétalien
Q2. [TRACKING] Voici les caractéristiques de produits que vous avez indiqué « toujours » rechercher lorsque vous faites vos achats d'épicerie ou que vous mangez à l'extérieur de la maison. Veuillez indiquer lesquelles vous considérez comme des « incontournables », ou des caractéristiques que les aliments que vous achetez doivent absolument posséder. *Veuillez choisir tout ce qui s'applique.*
[COLUMN HEADER: Incontournables]
[ONLY SHOW ITEMS WITH ALWAYS SELECTED IN Q1, MULTI-PUNCH DO NOT SHOW CATEGORY TITLES]

PRODUITS BIOLOGIQUES

[IF Q1 "OFTEN/ALWAYS/SOMETIMES" SELECTED FOR "ORGANIC PRODUCTION" ASK Q3A]
3A. Vous avez mentionné que vous recherchez les aliments biologiques lorsque vous faites des achats d'épicerie ou que vous mangez à l'extérieur de la maison. Veuillez songer au moment où vous allez à l'épicerie. À quelle fréquence achetez-vous des produits biologiques?
[SCALE – TO APPEAR AS COLUMNS]
Toujours
Souvent
Parfois
Rarement
Jamais
[IF Q3A "OFTEN/ALWAYS/SOMETIMES" ASK Q3B/C/D]
3B À votre avis, quel est l'avantage le plus important des aliments biologiques?

[LIST-SELECT ONE ONLY – RANDOMIZE]
Soutien de l'économie locale
Produits plus frais
Produits plus goûteux
Produits plus sûrs
Produits plus sains
Produits ayant un impact environnemental moindre
Produits moins chers
Avantages éthiques/moraux
Autre : veuillez préciser
3C. Veuillez indiquer dans quelle mesure vous êtes d'accord ou en désaccord avec l'énoncé suivant :
« Lorsque je fais des achats d'épicerie, je suis prêt à payer plus pour des produits biologiques ».
Fortement d'accord
Plutôt d'accord
Ni d'accord ni en désaccord
Plutôt en désaccord
Fortement en désaccord
3D. Comment déterminez-vous si un produit en particulier est « biologique » ou non?
(Veuillez choisir tout ce qui s'applique.)
L'étiquette porte la mention « Biologique Canada »
L'étiquette porte le logo Biologique Canada
Sur l'étiquette figure le mot « biologique »
L'étiquette fait mention que le produit est « certifié » biologique par un organisme indépendant
Le détaillant indique qu'il s'agit d'un produit biologique
J'achète directement d'un agriculteur qui adhère à des pratiques biologiques
Autre : veuillez préciser
Je ne sais pas/incertain
[IF Q3A "RARELY/NEVER" ASK Q5E/F]
3E. Quelles sont les principales raisons pour lesquelles vous n'achetez pas de produits alimentaires dont l'étiquette porte la mention « biologique »?
(Veuillez choisir tout ce qui s'applique.)
[LIST – ALL THAT APPLY - RANDOMIZE]
Ils ne sont généralement pas offerts là où je fais l'épicerie
Trop chers
Différence indiscernable ou inexistante par rapport à d'autres produits
Qualité moindre (moins beaux, apparence inégale)
Je ne comprends pas les avantages des produits biologiques
Je ne suis pas convaincu que ces produits sont vraiment biologiques
Je ne vois pas en quoi ces produits sont avantageux
Autre : veuillez préciser
3F. Est-ce que l'une ou l'autre des mesures suivantes vous motiverait à acheter davantage de produits alimentaires biologiques?
(Veuillez choisir tout ce qui s'applique.)

[LIST – ALL THAT APPLY - RANDOMIZE]
Certification des méthodes de production biologique par un organisme gouvernemental
Certification des méthodes de production biologique par une association de l'industrie
Certification des méthodes de production biologique par une autorité indépendante
Certification des méthodes de production biologique par le détaillant
Prix plus bas
Produits offerts à plus grande échelle
Renseignements sur les avantages des produits biologiques
Autre : veuillez préciser

PRODUITS LOCAUX

[IF Q1 "OFTEN/ALWAYS/SOMETIMES" SELECTED FOR "LOCALLY PRODUCED" ASK Q4A]
4A. Vous avez mentionné que vous recherchez les produits alimentaires locaux lorsque vous faites des achats d'épicerie ou que vous mangez à l'extérieur de la maison. Veuillez songer au moment où vous allez à l'épicerie. À quelle fréquence achetez-vous des produits locaux?
[SCALE – TO APPEAR AS COLUMNS]
Toujours
Souvent
Parfois
Rarement
Jamais
[IF Q4A "OFTEN/ALWAYS/SOMETIMES" ASK Q4B/C/D]
4B. À votre avis, quel est l'avantage le plus important des aliments locaux?
[LIST – SELECT ONLY ONE - RANDOMIZE]
Soutien de l'économie locale
Produits plus frais
Produits plus goûteux
Produits plus sûrs
Produits plus sains
Produits ayant un impact environnemental moindre
Produits moins chers
Avantages éthiques/moraux
Autre : veuillez préciser
4C. Veuillez indiquer dans quelle mesure vous êtes d'accord ou en désaccord avec l'énoncé suivant : « Lorsque je fais des achats d'épicerie, je suis prêt à payer plus pour des produits locaux ».
Fortement d'accord
Plutôt d'accord
Ni d'accord ni en désaccord
Plutôt en désaccord
Fortement en désaccord
4D. Comment déterminez-vous si un produit en particulier est d'origine « locale » ou non? Veuillez choisir tout ce qui s'applique.
L'étiquette fait mention de l'endroit où est située l'entreprise agricole ou de transformation d'où provient le produit
L'étiquette fait mention d'une entreprise agricole ou de transformation qui, à ma connaissance, est

locale
Le détaillant indique qu'il s'agit d'un produit local
Sur l'étiquette figurent des mots comme « naturel »
J'achète directement d'agriculteurs locaux
Autre : veuillez préciser
[IF Q4A "RARELY/NEVER" ASK Q6E/F]

4E. Quelles sont les principales raisons pour lesquelles vous n'achetez pas de produits dont l'étiquette porte la mention « local »?
(Veuillez choisir tout ce qui s'applique.)

[LIST – ALL THAT APPLY - RANDOMIZE]
Ils ne sont généralement pas offerts là où je fais l'épicerie
Trop chers
Différence indiscernable ou inexistante par rapport à d'autres produits
Qualité moindre (moins beaux, apparence inégale)
Je ne comprends pas les avantages des produits locaux
Je ne suis pas convaincu que ces produits sont vraiment d'origine locale
Je ne vois pas en quoi ces produits sont avantageux
Autre : veuillez préciser

4F. Est-ce que l'une ou l'autre des mesures suivantes vous motiverait à acheter davantage de produits alimentaires locaux?

(Veuillez choisir tout ce qui s'applique.)
[LIST – ALL THAT APPLY - RANDOMIZE]
Certification des méthodes de production locale par un organisme gouvernemental
Certification des méthodes de production locale par une association de l'industrie
Certification des méthodes de production locale par une autorité indépendante
Certification des méthodes de production locale par le détaillant
Prix plus bas
Produits offerts à plus grande échelle
Renseignements sur les avantages des produits locaux
Autre : veuillez préciser

PRODUITS RESPECTUEUX DE L'ENVIRONNEMENT
[IF Q1 "OFTEN/ALWAYS/SOMETIMES" SELECTED FOR "ENVIRONMENTALLY RESPONSIBLE PRODUCT" ASK Q5A]
5A. Vous avez mentionné que vous recherchez les produits respectueux de l'environnement lorsque vous faites des achats d'épicerie ou que vous mangez à l'extérieur de la maison. Veuillez songer au moment où vous allez à l'épicerie. À quelle fréquence achetez-vous des produits respectueux de l'environnement?

[SCALE – TO APPEAR AS COLUMNS]
Toujours

Souvent
Parfois
Rarement
Jamais
[IF Q5A "OFTEN/ALWAYS/SOMETIMES" ASK Q5B/C/D]
5B. À votre avis, quel est l'avantage le plus important des aliments issus de méthodes respectueuses de l'environnement?
[LIST-SELECT ONE ONLY – RANDOMIZE]
Soutien de l'économie locale
Produits plus frais
Produits plus goûteux
Produits plus sûrs
Produits plus sains
Produits ayant un impact environnemental moindre
Produits moins chers
Avantages éthiques/moraux
Autre : veuillez préciser

5C. Veuillez indiquer dans quelle mesure vous êtes d'accord ou en désaccord avec l'énoncé suivant : « Lorsque je fais des achats d'épicerie, je suis prêt à payer plus pour des produits respectueux de l'environnement ».

Fortement d'accord
Plutôt d'accord
Ni d'accord ni en désaccord
Plutôt en désaccord
Fortement en désaccord

5D. Comment déterminez-vous si un produit en particulier est respectueux de l'environnement ou non? Veuillez choisir tout ce qui s'applique.

L'étiquette fait mention d'une allégation relative à l'avantage du produit pour l'environnement
L'étiquette fait mention que le produit est « certifié » par un organisme indépendant (p. ex. « Marine Stewardship Council » ou « Ocean Wise »)
Le détaillant indique qu'il s'agit d'un produit respectueux de l'environnement
L'étiquette fait mention d'une entreprise agricole ou autre qui, à ma connaissance, adhère aux pratiques de production respectueuses de l'environnement
Autre : veuillez préciser

[IF Q5A "RARELY/NEVER" ASK Q5E/F]

5E. Quelles sont les principales raisons pour lesquelles vous n'achetez pas de produits alimentaires dont l'étiquette fait mention qu'il s'agit d'un produit issu de méthodes de production respectueuses de l'environnement?

(Veuillez choisir tout ce qui s’applique.)

[LIST – ALL THAT APPLY - RANDOMIZE]
Ils ne sont généralement pas offerts là où je fais l’épicerie
Trop chers
Différence indiscernable ou inexistante par rapport à d’autres produits
Qualité moindre (moins beaux, apparence inégale)
Je ne comprends pas les avantages des produits respectueux de l’environnement
Je ne suis pas convaincu que ces produits sont vraiment issus de méthodes respectueuses de l’environnement
Je ne vois pas en quoi ces produits sont avantageux
Autre : veuillez préciser

5F. Est-ce que l’une ou l’autre des mesures suivantes vous motiverait à acheter davantage de produits issus de méthodes de production respectueuses de l’environnement?
(Veuillez choisir tout ce qui s’applique.)

[LIST – ALL THAT APPLY - RANDOMIZE]
Certification des méthodes de production respectueuses de l’environnement par un organisme gouvernemental
Certification des méthodes de production respectueuses de l’environnement par une association de l’industrie
Certification des méthodes de production respectueuses de l’environnement par une autorité indépendante
Certification des méthodes de production respectueuses de l’environnement par le détaillant
Prix plus bas
Produits offerts à plus grande échelle
Renseignements sur les avantages des produits respectueux de l’environnement
Autre : veuillez préciser

BIEN-ÊTRE DES ANIMAUX

[IF Q1 “OFTEN/ALWAYS/SOMETIMES” SELECTED FOR “FREE RANGE” ASK Q6A]

6A. Vous avez mentionné que vous recherchez les produits dérivés d’animaux en liberté lorsque vous faites des achats d’épicerie ou que vous mangez à l’extérieur de la maison. Veuillez songer au moment où vous allez à l’épicerie. À quelle fréquence achetez-vous des aliments décrits comme dérivés d’animaux en liberté ou produits dans le respect d’autres conditions liées au traitement des animaux?

[SCALE – TO APPEAR AS COLUMNS]
Toujours
Souvent
Parfois
Rarement

Jamais

[IF Q6A “OFTEN/ALWAYS/SOMETIMES” ASK Q6B/C/D]

6B. À votre avis, quel est l’avantage le plus important des aliments d’origine animale décrits comme dérivés d’animaux en liberté ou produits dans le respect d’autres conditions liées au traitement des animaux?

[LIST-SELECT ONE ONLY – RANDOMIZE]
Soutien de l’économie locale
Produits plus frais
Produits plus goûteux
Produits plus sûrs
Produits plus sains
Produits ayant un impact environnemental moindre
Produits moins chers
Avantages éthiques/moraux
Autre : veuillez préciser

6C. Veuillez indiquer dans quelle mesure vous êtes d’accord ou en désaccord avec l’énoncé suivant : « Lorsque je fais des achats d’épicerie, je suis prêt à payer plus pour des aliments d’origine animale décrits comme dérivés d’animaux en liberté ou produits dans le respect d’autres conditions liées au traitement des animaux».

Fortement d’accord
Plutôt d’accord
Ni d’accord ni en désaccord
Plutôt en désaccord
Fortement en désaccord

6D. Comment déterminez-vous si un aliment d’origine animale en particulier est vraiment dérivé d’animaux en liberté ou produits dans le respect d’autres conditions liées au traitement des animaux? Veuillez choisir tout ce qui s’applique.

L’étiquette fait mention d’une allégation comme « dérivé d’animaux en liberté » ou « méthode d’élevage traditionnelle »
L’étiquette fait mention que le produit est « certifié » par un organisme indépendant (p. ex. « Humane Society »)
Le détaillant indique qu’il s’agit d’un produit issu de méthodes respectant le bien-être des animaux
L’étiquette fait mention d’une entreprise agricole ou de transformation qui, à ma connaissance, adhère aux pratiques respectant le bien-être des animaux
Autre : veuillez préciser

[IF Q6A “RARELY/NEVER” ASK Q6E/F]

6E. Quelles sont les principales raisons pour lesquelles vous n'achetez pas de produits décrits comme dérivés d'animaux en liberté ou produits dans le respect d'autres conditions liées au traitement des animaux?
(Veuillez choisir tout ce qui s'applique.)

[LIST – ALL THAT APPLY - RANDOMIZE]
Ils ne sont généralement pas offerts là où je fais l'épicerie
Trop chers
Différence indiscernable ou inexistante par rapport à d'autres produits
Qualité moindre (moins beaux, apparence inégale)
Je ne comprends pas les avantages des aliments produits dans des conditions respectant le bien-être des animaux
Je ne suis pas convaincu que ces aliments sont vraiment produits dans des conditions respectant le bien-être des animaux
Je ne vois pas en quoi ces produits sont avantageux
Autre : veuillez préciser

6F. Est-ce que l'une ou l'autre des mesures suivantes vous motiverait à acheter davantage de produits d'origine animale décrits comme dérivés d'animaux en liberté ou produits dans le respect d'autres conditions liées au traitement des animaux?
(Veuillez choisir tout ce qui s'applique.)

[LIST – ALL THAT APPLY - RANDOMIZE]
Certification des méthodes de production sans cruauté par un organisme gouvernemental
Certification des méthodes de production sans cruauté par une association de l'industrie
Certification des méthodes de production sans cruauté par une autorité indépendante
Certification des méthodes de production sans cruauté par le détaillant
Prix plus bas
Produits offerts à plus grande échelle
Je ne comprends pas les avantages des aliments d'origine animale produits dans des conditions respectant le bien-être des animaux
Autre : veuillez préciser

TECHNOLOGIES DE PRODUCTION DES ALIMENTS

7A. La prochaine série de questions porte sur l'utilisation de technologies nouvelles ou de pointe pour la production de produits alimentaires. Veuillez indiquer si vous connaissez les technologies de production alimentaire suivantes :

[SCALE – TO APPEAR AS COLUMNS]
J'en ai entendu parler et j'en connais beaucoup sur le sujet
J'en ai entendu parler et j'en connais un peu sur le sujet
J'en ai seulement entendu parler
Je n'en ai jamais entendu parler

[LIST - RANDOMIZE]
Irradiation
Biotechnologie animale
Génie génétique
Nanotechnologie
Transformation à haute pression

[FOR EACH TECHNOLOGY, IF Q9A “HEARD OF IT AND KNOW LITTLE/LOT ABOUT IT” ASK Q7B]

7B. Vous avez mentionné que vous en savez au moins un peu au sujet des technologies suivantes. Dans quelle mesure serait-il probable que vous achetiez des aliments issus de ces technologies?

[SCALE – TO APPEAR AS COLUMNS]
Très probable
Plutôt probable
Neutre
Plutôt improbable
Très improbable
Je ne sais pas/incertain

[LIST - RANDOMIZE]
Irradiation
Biotechnologie animale
Génie génétique
Nanotechnologie
Transformation à haute pression

[FOR EACH TECHNOLOGY, IF Q9B “SOMEWHAT/VERY UNLIKELY” ASK Q7C]

7C. Vous avez indiqué qu’il serait plutôt ou très improbable que vous achetiez des aliments issus des technologies suivantes. Pour chacune, veuillez indiquer la raison la plus importante pour laquelle vous êtes réticent à en acheter :

[SCALE]
Craintes qu’il s’agisse d’une technologie non respectueuse de l’environnement
Craintes que les aliments issus de cette technologie ne soient pas bons pour la santé
Craintes de répercussions à long terme de la consommation d’aliments issus de cette technologie sur la santé
Craintes que cette technologie réduise la qualité nutritionnelle de l’aliment
Craintes que cette technologie porte atteinte aux fournisseurs utilisant des technologies de production traditionnelle
Je ne suis pas suffisamment renseigné au sujet de cette technologie
Je ne sais pas/incertain

[LIST - RANDOMIZE]
Irradiation
Biotechnologie animale
Génie génétique
Nanotechnologie
Transformation à haute pression

SALUBRITÉ ET QUALITÉ DES ALIMENTS

La prochaine série de questions porte sur la salubrité et la qualité des aliments canadiens.

8. [Tracking] Quelle est votre impression générale de la qualité des aliments produits au Canada? Sont-ils...?

[LIST – SELECT ONE ONLY]
D'excellente qualité
De bonne qualité
De qualité moyenne
De mauvaise qualité
De très mauvaise qualité

9. [Tracking] Dans quelle mesure êtes-vous certain que les aliments produits au Canada sont sans danger? En êtes-vous...?

[LIST – SELECT ONE ONLY]
Tout à fait certain
Certain
Plutôt certain
Pas très certain
Pas du tout certain

10. À quelles sources d'information vous fiez-vous le plus pour vous renseigner sur les questions d'aliments et de nutrition?
(Veuillez choisir un maximum de trois réponses.)

Articles dans les journaux et les magazines
Reportages à la télévision et à la radio
Livres
Médecins, nutritionnistes ou autres professionnels de la santé
Internet (médias sociaux et blogues)
Internet (sites Web sur les aliments)
Internet (sites Web de nouvelles)
Internet (sites Web du gouvernement)
Bouche-à-oreille
Publicités des entreprises alimentaires

Ipsos

Publicités des détaillants en alimentation
Publications imprimées du gouvernement
Aucune de ces réponses
Je ne sais pas/incertain

11. Au cours de la dernière année, quel genre de renseignements ont le plus influencé vos décisions d'achats à l'épicerie?
(Veuillez choisir un maximum de trois réponses.)

Incidents liés à la salubrité des aliments/rappels
Enjeux généraux liés à la santé et à la nutrition
Additifs/résidus alimentaires
Technologies de production alimentaire
Pratiques des détaillants
Pratiques des producteurs
La réglementation du gouvernement
Liens entre le régime alimentaire et les maladies
Régimes alimentaires particuliers (perte de poids, etc.)
Aucune de ces réponses
Je ne sais pas/incertain

12A. L'irradiation est un procédé ayant recours au rayonnement ionisant et utilisé comme mesure de salubrité des aliments pour diminuer les niveaux de bactéries qui causent l'intoxication alimentaire et la dégradation des aliments. Veuillez indiquer ce que vous pensez de ce procédé sur l'échelle ci-dessous.

Fortement pour
Plutôt pour
Ni pour ni contre
Plutôt contre
Fortement contre
Je ne sais pas

12B. Si vous saviez que [STATEMENT FROM LIST], que penseriez-vous alors de l'utilisation de ce procédé?

Opinion beaucoup plus positive
Opinion un peu plus positive
À peu près la même opinion
Opinion un peu plus négative
Opinion beaucoup plus négative

[LIST – RANDOMIZE]
l'irradiation peut améliorer la salubrité des aliments en réduisant le risque d'intoxication alimentaire
l'irradiation peut augmenter la durée de conservation des aliments en réduisant la dégradation des

aliments
les effets à long terme sur la santé liés à la consommation d'aliments irradiés sont inconnus

12C. Veuillez indiquer si vous êtes d'accord ou en désaccord avec les énoncés suivants au sujet de l'irradiation des aliments.

Je suis préoccupé par la salubrité des produits alimentaires irradiés
Je suis préoccupé par la sûreté du procédé d'irradiation
Je crois que tout aliment irradié devrait être étiqueté comme tel

[GRID]
Fortement d'accord
Plutôt d'accord
Ni d'accord ni en désaccord
Plutôt en désaccord
Fortement en désaccord

13A. Lesquels des énoncés suivants vous rendraient plus confiant face à l'achat d'aliments irradiés?

[MULTI PUNCH LIST – RANDOMIZE]
Assurance d'un groupe indépendant de scientifiques que la consommation d'aliments irradiés est sûre
Assurance de scientifiques au sein du gouvernement que la consommation d'aliments irradiés est sûre
Certification de la sûreté des procédés et des installations d'irradiation par une autorité indépendante
Certification de la sûreté des procédés et des installations d'irradiation par une instance gouvernementale
Renseignements sur les avantages en matière de salubrité et de durée de conversation des aliments irradiés
Renseignements au sujet des répercussions sur la santé de la consommation d'aliments irradiés
Autre : veuillez préciser

13B. Envisageriez-vous l'achat d'aliments irradiés dans l'une ou l'autre des circonstances suivantes?

[LIST – SELECT ALL THAT APPLY - RANDOMIZE]
J'envisagerais l'achat d'aliments irradiés dans toutes circonstances
Si un groupe indépendant de scientifiques évaluait la technologie d'irradiation et en concluait qu'elle améliore la salubrité des aliments et que ceux-ci sont au moins aussi sûrs et nutritifs que les aliments non irradiés
Si des scientifiques du gouvernement évaluaient la technologie d'irradiation et en concluaient qu'elle améliore la salubrité des aliments et que ceux-ci sont au moins aussi sûrs et nutritifs que les aliments non irradiés
Si tous les aliments irradiés étaient étiquetés comme tels pour permettre aux consommateurs de faire leurs propres choix
Je n'envisagerais pas l'achat d'aliments irradiés quelles que soient les circonstances
Autre : veuillez préciser

SYSTÈMES D'ASSURANCE

La prochaine série de questions porte sur le système alimentaire canadien, y compris le gouvernement, l'industrie et les organismes indépendants.

14. Lorsque vous recherchez des produits alimentaires ayant des attributs précis, dans quelle mesure avez-vous confiance en l'exactitude des étiquettes apposées sur les aliments offerts en épicerie? Veuillez indiquer votre degré de confiance en ce qui a trait à chacun des attributs alimentaires suivants :

[SCALE]
Tout à fait confiant
Très confiant
Plutôt confiant
Pas très confiant
Pas du tout confiant
Je ne porte aucune attention à cet attribut lorsque j'achète des aliments

[LIST – RANDOMIZE]
Produit localement
Respectueux de l'environnement
Valeur nutritive
Allégations relatives à la santé
Pratiques respectant le bien-être des animaux
Commerce équitable
Casher/halal
Biologique
Végétalien/végétarien
Ingrédients importés
Exempt d'hormones ou d'antibiotiques

15. Lorsque vous recherchez des produits alimentaires ayant des attributs précis (comme biologiques ou locaux), quelles mesures de l'industrie ou du gouvernement pourraient accroître votre confiance en l'exactitude des étiquettes apposées sur les produits alimentaires offerts en épicerie?

[CHOICES MULTI PUNCH]
Certification par un organisme gouvernemental
Certification par un vérificateur indépendant
Certification par le producteur
Certification par une association de l'industrie
Autre
Je ne porte aucune attention à cet attribut lorsque j'achète des aliments [EXCLUSIVE CHOICE]

[LIST – RANDOMIZE]

Produit localement
Respectueux de l’environnement
Valeur nutritive
Allégations relatives à la santé
Pratiques respectant le bien-être des animaux
Commerce équitable
Casher/halal
Biologique
Végétalien/végétarien
Ingrédients importés
Exempt d’hormones ou d’antibiotiques

16. Lorsque vous recherchez des produits alimentaires ayant des attributs précis, quelle mesure prenez-vous si vous n’êtes pas certain de l’exactitude de l’étiquette apposée sur un produit alimentaire en épicerie?

[SINGLE PUNCH CHOICES]
Je l’achète même si aucun autre produit ne présente des allégations plus crédibles relatives à ces attributs
Je l’achète seulement si le prix n’est pas plus élevé que des produits similaires ne présentant aucune allégation relative à ces attributs
Je demande au détaillant de vérifier les allégations relatives à ces attributs
Je cherche le produit dans un autre magasin d’alimentation
J’achète un produit alimentaire différent
Autre
Je ne porte aucune attention à cet attribut lorsque j’achète des aliments

[LIST – RANDOMIZE]
Produit localement
Respectueux de l’environnement
Valeur nutritive
Allégations relatives à la santé
Pratiques respectant le bien-être des animaux
Commerce équitable
Casher/halal
Biologique
Végétalien/végétarien
Ingrédients importés
Exempt d’hormones ou d’antibiotiques

17A. Lesquels des appareils suivants utilisez-vous régulièrement pour en savoir plus sur les attributs et la valeur nutritive des aliments?

[LIST – ALL THAT APPLY – RANDOMIZE]

Ordinateur de bureau
Ordinateur portable
Tablette
Téléphone intelligent
Autre ordinateur ou appareil mobile
Aucune de ces réponses

17B. Avez-vous déjà utilisé un téléphone intelligent ou un appareil portatif pour lire le code à barres (y compris les codes à barres QR ou 2D) d'un produit de détail?

[GRID DOWN]
Sur des étiquettes d'emballage ou d'étagère dans un magasin d'alimentation
Sur des étiquettes d'emballage ou d'étagère dans un autre type de magasin
Sur des affiches ou un étalage publicitaire
Sur des publicités imprimées ou des articles de journaux ou de magazines
Aucune de ces réponses

[GRID ACROSS]
Oui
Non

18. [Tracks to 2006] Dans quelle mesure êtes-vous certain du système alimentaire canadien ou du système d'assurance de la salubrité pour ce qui est de gérer chacun des objets de préoccupation suivants?

[RESPONSES – SHOW AS COLUMNS]
Tout à fait certain
Plutôt certain
Neutre
Pas très certain
Pas du tout certain

[LIST – RANDOMIZE]

Additifs alimentaires ou agents de conservation
Maladies animales (p. ex., maladie de la vache folle ou grippe aviaire)
Contamination bactérienne résultant de la transformation des aliments (p. ex., E. coli et la salmonelle)
Organismes génétiquement modifiés ou OGM
Teneur en hormones ou en antibiotiques et résidus de pesticides

Aliments issus de méthodes de production biologique
Allergènes alimentaires

CARACTÉRISTIQUES PERSONNELLES

19. [Tracks to 2006] Veuillez indiquer si vous êtes d'accord ou en désaccord avec les énoncés suivants (sur une échelle de 1 à 7, où 1 signifie « fortement en désaccord » et 7, « fortement d'accord »).

[SCALE]
Fortement en désaccord 1
2
3
4
5
6
Fortement d'accord 7
Je ne sais pas/Incertain

[RESPONSES] +*
Je suis maître du contenu des aliments que j'achète
Je me préoccupe de la salubrité des aliments que je mange
Je suis difficile en ce qui concerne la qualité des aliments, et j'achète ce que je peux m'offrir de mieux
Je fais très attention à la façon dont je range et prépare la nourriture
J'utilise des planches à découper différentes pour la viande crue et les légumes
La durée de conservation des restes au réfrigérateur n'a pas d'importance, pourvu que je les réchauffe bien
Je jette les aliments lorsque la date de consommation recommandée est dépassée
J'ai déjà demandé à mon détaillant des conseils sur la qualité et la salubrité des aliments
J'achète des produits alimentaires biologiques seulement s'ils sont certifiés biologiques
Je suis la principale personne responsable de préparer les repas à la maison
Je me suis interrogé sur la manière dont l'épicerie où je vais manipule les aliments
Quand c'est possible, je mange des aliments qui sont produits dans ma région
Je lis le tableau de la valeur nutritive pour décider des aliments à acheter
Je lis la liste des ingrédients pour décider des aliments à acheter
Je lis les allégations sur l'alimentation/la santé pour décider des aliments à acheter
Je serais prêt à payer davantage pour acheter des aliments de qualité supérieure

20. [Tracks to 2006] Avez-vous déjà évité d'acheter ou boycotté un produit alimentaire particulier parce que/à cause de…

[ACROSS]
Oui
Non

[DOWN]
Vous étiez préoccupé par la salubrité de l'aliment
Vous étiez préoccupé par la façon dont les animaux étaient traités

Vous étiez préoccupé par le fait qu'on n'a pas eu recours à des pratiques respectueuses de l'environnement
Vous souhaitiez ne pas acheter d'aliments produits par une entreprise en particulier
Vous étiez préoccupé par les rappels d'aliments
Autre
Aucun

21. [Tracks to 2006] À quelle fréquence faites-vous les choses suivantes?

[SCALE]
Toujours
La plupart du temps
Parfois
Jamais
Ne s'applique pas
Je ne sais pas/Incertain

[CATEGORIES]
Lire les dates de péremption (« Meilleur avant »)
Demander l'avis du détaillant
Demander l'avis d'un professionnel comme un nutritionniste, un conseiller en économie domestique ou un médecin
Utiliser Internet comme source de renseignements sur la salubrité des aliments
Évaluer les pratiques de manipulation des aliments utilisées là où vous achetez vos aliments

22. [Tracks to 2006]
Au cours de la dernière année, avez-vous changé vos habitudes en ce qui concerne l'achat des aliments en raison…

[SCALE]
Oui
Non
Je ne sais pas/Incertain

[CATEGORIES]
de la salubrité
de la qualité
du régime alimentaire/de la santé

Demographic Questions

D1. En moyenne, combien dépensez-vous en épicerie par mois dans votre foyer?

[RANGE IN $ 0-1000]

D2. Au cours d’une semaine moyenne, vous mangez combien de repas qui n’ont pas été préparés à la maison?

[RANGE 0 to 50]

D3. Quelle langue parlez-vous le plus souvent à la maison? [ACCEPTER TOUS LES CHOIX PERTINENTS]
Anglais
Français
Autre [PRÉCISER]
Refuse de répondre

D4. Laquelle des catégories suivantes décrit le mieux votre emploi actuel? Êtes-vous : [N’ACCEPTER QU’UNE SEULE RÉPONSE]
Employé(e) à temps plein (35 heures ou plus par semaine)?
Employé(e) à temps partiel (moins de 35 heures par semaine)?
Travailleur ou travailleuse autonome?
Sans emploi, mais à la recherche d’un emploi?
Étudiant ou étudiante à temps plein?
Retraité(e)?
Absent du marché du travail? [FULL-TIME HOMEMAKER, UNEMPLOYED, NOT LOOKING FOR WORK /AU FOYER À TEMPS PLEIN, SANS EMPLOI ET N’EN RECHERCHANT PAS]
Autre [DO NOT SPECIFY]
Refuse de répondre

D5. Quel est le niveau de scolarité le plus élevé que vous ayez atteint?
(Si vous êtes actuellement aux études, veuillez choisir le dernier niveau terminé ou le dernier diplôme obtenu.) (Veuillez choisir une réponse.)

8e année ou moins
Études secondaires non terminées
Diplôme d'études secondaires ou l'équivalent
Apprentissage enregistré ou diplôme ou certificat d'une école de métiers
Collège, CEGEP, ou certificat ou diplôme non universitaire
Certificat universitaire ou diplôme inférieur au baccalauréat
Baccalauréat
Certificat universitaire supérieur au baccalauréat
Refuse de répondre