



2023 Survey on Consumer Perceptions of Food (Wave VI)

Executive Summary

Prepared for Agriculture and Agri-Food Canada

Supplier: Ipsos

Contract Number: CW2274135

Contract Value: \$62,698.95 (including HST)

Contract Award Date: February 17, 2023

Delivery Date: May 19, 2023

Registration Number: POR 124-22

For more information on this report, please contact Agriculture and Agri-Food Canada at aafc.info.aac@agr.gc.ca

Ce rapport est aussi disponible en français



Catalogue Number: A22-627/2023E-PDF
International Standard Book Number (ISBN): 978-0-660-49071-7
Agriculture and Agri-Food Canada Number: 13161E
Related publications (registration number: POR 124-22)

Ce rapport est aussi disponible en français sur le titre: Sondage de 2023 sur les perceptions des consommateurs à l'égard des aliments (Vague VI) : rapport méthodologique
Numéro de catalogue : A22-627/2023F-PDF
Numéro international normalisé du livre (ISBN) : 978-0-660-49072-4
Numéro d'Agriculture et Agroalimentaire Canada : 13161F
Publications connexes (numéro d'enregistrement : ROP 124-22)

Unless otherwise specified, you may not reproduce materials in this publication, in whole or in part, for the purposes of commercial redistribution without prior written permission from Agriculture and Agri-Food Canada's copyright administrator. To obtain permission to reproduce Government of Canada materials for commercial purposes, apply for Crown Copyright Clearance by contacting:

Agriculture and Agri-Food Canada

Alexandra Bray
Manager, Public Opinion Research and Consultations
1341 Baseline Road Ottawa, ON, K1A 0C5
Telephone: 613-297-7350
Email: alexandra.bray2@agr.gc.ca

Agriculture and
Agri-Food CanadaAgriculture et
Agroalimentaire Canada

Political neutrality statement

I hereby certify, as a Representative of Ipsos, that the deliverables fully comply with the Government of Canada political neutrality requirements outlined in the Government of Canada's Policy on Communications and Federal Identity and Directive on the Management of Communications. Specifically, the deliverables do not include information on electoral voting intentions, political party preferences, party standings with the electorate, or ratings of the performance of a political party or its leaders.

A handwritten signature in black ink, appearing to read "M. Colledge".

Mike Colledge,
President
Ipsos Public Affairs
Signed on 5.17.23

Table of contents

Executive summary.....	1
Introduction and background	1
Research objectives.....	1
Target population.....	1
Research usage.....	2
Expenditure	2
Consent.....	2
Study methodology	2

Executive summary

Introduction and background

Agriculture and Agri-Food Canada (AAFC) supports the Canadian agriculture and agri-food industry through initiatives that promote innovation and competitiveness. The activities of the Department range from the farmer to the consumer, from the farm to global markets, through all phases of producing, processing and marketing of farm, food and bio-based products.

To support its mandate, the Department regularly conducts public opinion research to determine the opinions and attitudes of Canadians and agricultural producers and agricultural processors. The Department uses the results of the research it commissions to develop policies, services and programs, and communications planning. Results are shared internally, as well as with provincial and territorial counterparts, and the Canadian public.

AAFC conducts the Survey on Consumer Perceptions of Food periodically. The study tracks consumer perceptions of food products, including quality and market attribute preferences over time (such as, point of purchase attributes for making purchasing decisions), views on production methods (for example, local, organic, humane and environmentally sustainable production claims) and views on food production (for example, biotechnology and genetic engineering). The first wave was conducted in 2004, with subsequent waves conducted in 2006, 2010, 2014 and 2019. Each wave is modified to reflect current issues, while retaining some indicators to track the perceptions of consumers over time.

Wave VI, conducted in 2023, is built on the data collected in the previous years to track changes in consumer perceptions of food, purchasing behaviours and preferences for certain food attributes. This research also assessed consumer perceptions and behaviours with respect to food attributes that have received increased attention from buyers since the previous waves.

Research objectives

The 2023 wave of the survey is built on tracking questions from the previous wave to identify trends over time and also provides insights on new and evolving areas of interest to AAFC.

Specific objectives of the survey includes assessing:

- Canadians' self-reported food purchasing habits, information acquisition, preferences and decision making drivers (for example, point of purchase attributes for making purchasing decisions);
- Canadians' views on production methods (for example, local, organic, humane, environmentally sustainable production claims);
- Canadians' views on food production (for example, biotechnology and genetic engineering);
- Exploring drivers of Canadians' trust in the agricultural sector;
- Understanding Canadians' views on sustainability in the agricultural sector; and
- Trends in the data collected from year to year.

Target population

The survey was conducted among Canadian adults (aged 18 and older) who have at least shared (50% or greater) responsibility for grocery shopping for the household. To ensure comparability with previous waves of

research, a total of 3,343 completed surveys were achieved. Additional details about the sample composition are specified in the appendix.

Research usage

This wave of the survey will build on the data collected in the previous waves to track changes in consumer perceptions of food, purchasing behaviours and preferences for certain food attributes. This research will also be used to assess consumer perceptions and behaviours with respect to food attributes that have received increased attention from buyers since the previous waves.

In addition, this 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 and market attributes in Canada. The findings will be used in the development of policies, programs and initiatives, to improve communications and to better serve clients.

Expenditure

The survey entailed an expenditure of \$62,698.95, including HST.

Consent

Ipsos offers this written consent allowing the Librarian and Archivist of Canada to post, in both official languages, this Methodology Report.

Study methodology

Overview

A quantitative research design was used in this tracking study. Survey fieldwork took place from March 16 to 28, 2023.

Data collection instrument

This quantitative research was administered using a computer assisted web interviewing (CAWI) system (or otherwise reproducing the questionnaire for an online survey). Surveys were self-completed, and duration of interview was on average 20 minutes. The survey was offered in both official languages in Canada, English and French.

The data collection instrument was pre-tested with a total of 20 individuals. Ten tests were conducted in each language, English and French. No adjustments to the survey were needed after the pre-test.

Questionnaire design

The survey instrument consisted of a series of closed-end and open-end questions designed in consultation with AAFC. To address the objective of identifying food perceptions trends over time, the questionnaire design followed the design used in the previous waves of the study. Since comparability with data collected in the past wave is crucial, questions and survey logic was kept consistent with that used in the 2019 study. New questions have been added to capture emerging trends and provide a base for tracking the progress of these

trends. Insertion of new questions were thoughtfully added to mitigate potential influence on existing tracking questions.

Sample and sampling design

A total of 3,343 Canadian adults (aged 18 and older) who have at least shared (50% or greater) responsibility for grocery shopping for the household completed the survey.

The research was conducted via a custom online survey approach, which provides efficiencies both in terms of delivering on the research objectives within the specified timeframe and doing so in a cost-effective way. The sample is a non-probability online panel sample, sourced from the online panel capabilities from Ipsos' partner Canadian Viewpoint Inc.

Quota sampling was administered using the latest Statistics Canada census information to ensure that the sample frame is representative of the Canadian population. Regional quotas were defined following a disproportionate sampling approach to provide larger sample sizes among those who reside in Manitoba/Saskatchewan and in Atlantic Canada.

The final survey data is weighted by region, gender, age and education to reflect a representative distribution of the Canadian population according to the Statistics Canada Census 2021. All sample surveys may be subject to other sources of error, including, but not limited to coverage error and measurement error. Due to the effects of rounding, figures may not always equal 100%.

Incentives were not used for recruitment purposes; however, respondents were compensated for their time after completing the survey. The compensation is directly proportionate to the amount of time taken to complete the survey and is comparable to the compensation offered by other online panel sources. Participants are provided with compensation in the form of "points", which can be accumulated and exchanged for a reward of their choosing.

Sample composition and weighting

The table below indicates the unweighted and weighted demographic distribution of the sample, in counts and proportions. Weighting was applied to the responses to ensure that the final data reflects the adult population of Canada, as per Statistics Canada Census 2021.

Table 1 – Sample composition and weighted sample

	Sample Breakdown	Unweighted sample counts	Weighted sample counts	Unweighted sample proportions	Weighted sample proportions
Total	Total Canada	3343	3343		
Age	18-34 years	777	902	23%	27%
	35-44 years	583	570	17%	17%

	45-54 years	552	535	17%	16%
	55-64 years	614	567	18%	17%
	65 years or older	817	768	24%	23%
Gender	Male	1405	1632	42%	49%
	Female	1926	1699	58%	51%
	Other	2	2	0%	0%
	Non-binary person	10	10	0%	0%
Region	British Columbia	438	466	14%	14%
	Alberta	377	367	11%	11%
	Saskatchewan/Manitoba	362	200	11%	6%
	Ontario	1226	1304	37%	39%
	Quebec	566	769	17%	23%
	Atlantic Canada	371	233	11%	7%
	Territories	3	3	0%	0%
Education	Grade 8 or less	21	45	1%	1%
	Some high school	176	421	5%	13%
	High School diploma or equivalent	972	941	29%	28%
	Registered Apprenticeship or other trades certificate or diploma	231	205	7%	6%
	College, CEGEP or other non-university certificate or diploma	913	798	27%	24%
	University certificate or diploma below bachelor's level	107	100	3%	3%
	Bachelor's degree	629	566	19%	17%
	Post graduate degree above bachelor's level	294	266	9%	8%

Non-response bias

If there is no systematic bias in responding to the survey, the unweighted profile of the survey participants would be very similar to the profile of the Canadian population according to the Statistics Canada Census 2021 (that is, within sampling error). The tables above demonstrate that, in most cases, the survey sample was similar to the representative distribution of the Canadian population with respect to age and gender. With

respect to region, since disproportionate sampling was employed to provide larger sample sizes among those who reside in Manitoba/Saskatchewan and in Atlantic Canada it was expected that the unweighted proportions for those regions would be higher than the actual proportion of the Canadian population. The only subgroup where a large gap appears is related to level of education achieved and specifically those with some high school. Since a large gap exists, slightly heavier weights were used to adjust this item to the representative proportion based on the latest Census. Aside from this, the unweighted profile of survey participants and the profile of the Canadian population are very similar, indicating that non-response bias was likely not an important factor in this research.

Response rate

For this survey, a non-probability sample was used. Therefore, a response rate cannot be calculated.

The following table provides the participation rate for this online survey. The participation rate for this survey was 67.5%, and it is calculated as follows:

Table 2 – Participation rate calculation

Disposition	Baseline Survey
Invalid Cases	0
Unresolved (U)	0
In-scope non-responding (IS)	2,157
Responding units (R)	4,485
Participation Rate=R/(R+IS+U)	67.5%

Online survey cases can be broken down into four broad categories:

Invalid Cases

These can include only clearly invalid cases (for example, invitations mistakenly sent to people who did not qualify for the study, or incomplete or missing email addresses in a client-supplied list).

Unresolved (U)

These include all the cases where it cannot be established whether the invitation was sent to an eligible or an ineligible respondent or unit (for example, when email invitations bounce back or remain without an answer before the candidate could be qualified).

In-scope non-responding (IS)

These include all refusals, either implicit or explicit, all non-contacts and early break-offs of known eligible cases, and other eligible non-respondents (due to illness, leave of absence, vacation or other).

Responding units (R)

These include cases who have participated but who were disqualified afterwards (for example, when admissible quotas have been reached). It also includes all completed surveys or partially completed surveys that meet the criteria set by the researcher to be included in the analysis of the data.

Unresolved (U), in-scope (IS), and responding units (R) are all included in the broad category of “potentially eligible” cases. However, invalid cases are not included in the calculation of outcome rates.

For this survey, a router was used to screen potential respondents and assign them to one of the surveys from the router. The router is a platform used to distribute and manage surveys. This means that individuals who were not eligible to participate in this study because they did not meet the screening criteria would be sent to participate in other surveys that might have been available in the router at that point.

The router assignment precedes the actual survey, and given this, it is not possible to estimate the number of cases “invited” to participate and whether they were eligible or not. Therefore, it is not possible to estimate the “unresolved” cases. For this survey, responding units are broken out as follows.

Table 3 – Completions

Disposition	Baseline Survey
Over quota	1,142
Qualified Completes	3,343
Responding units (R)	4,485

Possible sources of sample bias

The online panel sample routing technology utilized in online surveys may introduce sources of bias. One potential bias is self-selection bias, where participants voluntarily choose to join the panel and decide to participate in surveys based on their personal motivations or interests. Weighted randomization can be applied to mitigate this. The online panel sample routing technology uses weighted randomization to assign surveys to participants. Upon entry into the system, panelists are checked to ensure they have not exceeded survey participation limits. A list of potential survey matches is determined for each panelist based upon the information we know about them, in the case of this study parameters such as age, gender and region were used. Another source of bias is screening bias, as participants were screened based on specific criteria. In this study, panelists were asked additional screening questions within the system to ensure they meet the project criteria. Participants were screened out if they were not the primary grocery shopper or at least shared the grocery shopping responsibility evenly with another member of the household. Potential participants were also screened out if they refused to identify the province where they reside or their level of education. Additionally, efforts to prioritize certain populations with lower response rates to improve overall participation can introduce non-response bias. Priority may be given to certain populations that typically have lower response rates. For example, towards the end of the data collection period, quotas set for young respondents and males were lagging. Prioritization is used to mitigate this issue; however, this is kept to a minimum as survey randomization must remain in place as a key element for preventing bias. In this case, limited prioritization was applied during the field window, therefore there is a low chance of sample bias.

Accessibility and data security

The survey platform is compliant with the Accessibility for Ontarians with Disabilities Act (AODA) according to Web Content Accessibility Guidelines (WCAG2.0AA). Panelists were able to submit queries regarding

alternative modes of data collection and/or formats that are available to make the survey accessible to persons with disabilities.

The survey invitation included the Canadian Research Insights Council (CRIC) survey registration number so that survey respondents had the ability to verify the legitimacy of the survey as a research initiative sponsored by the Government of Canada.

Survey respondents were informed of their rights under the Privacy Act, the Personal Information Protection and Electronic Documents Act, and the Access to Information Act, and that respondents' rights will be protected throughout the research process.

All field staff directly involved in data collection and tabulation are located in Canada, and all survey data is stored on servers and backup servers located solely in Canada. Respondent confidentiality and protection of personally identifiable information throughout data processing and data management has been maintained.