

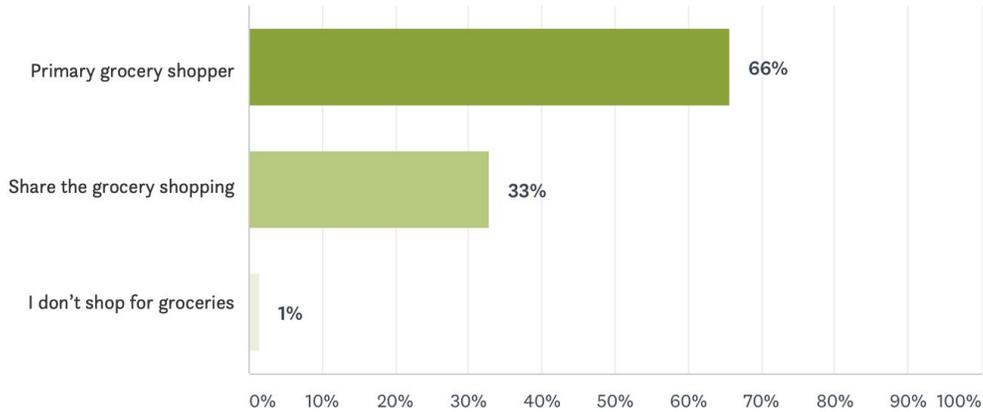
The Organic Council of Ontario

**Food Choices and Environmental Impact
Consumer Survey**

Date: July 23, 2020 to August 16, 2020
Total Responses: 207

Q1: What is your role in grocery shopping for your household?

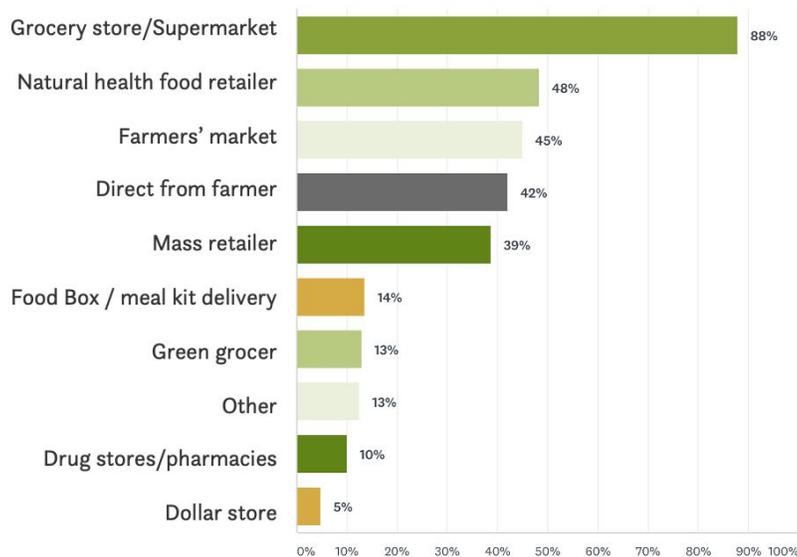
Answered: 207 Skipped: 0



ANSWER CHOICES	RESPONSES	
Primary grocery shopper	66%	136
Share the grocery shopping	33%	68
I don't shop for groceries	1%	3
TOTAL		207

Q2: In the past 12 months, which of the following places have you purchased your groceries from most frequently? Select up to four.

Answered: 207 Skipped: 0



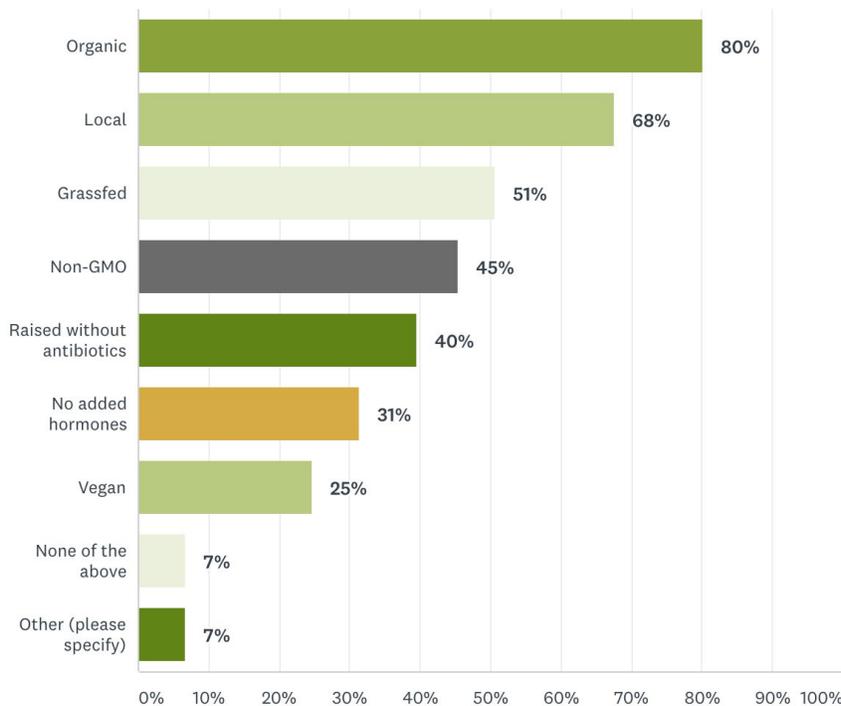
ANSWER CHOICES	RESPONSES	
Grocery store/Supermarket	88%	182
Natural health food retailer	48%	100
Farmers' market	45%	93
Direct from farmer (eg. CSA or farm-gate sales)	42%	87
Mass retailer (eg. Costco, Walmart)	39%	80
Food box / meal kit delivery (eg. GoodFood, Mama Earth)	14%	28
Green grocer	13%	27
Other (please specify)	13%	26
Drug stores/pharmacies	10%	21
Dollar store	5%	10
Total Respondents: 207		

Other:

Zero waste store, market garden, bulk retailer that focuses on local/organic/reduced packaging, butcher, local stands, produce my own food, co-operative grocery store, organic grocery store, local businesses, grocery delivery service

Q3: In the past 12 months, have you paid a higher price to purchase products with any of the following labels? Select all that apply.

Answered: 207 Skipped: 0



Other:

Reduced packaging, free range, humanely raised, sustainably grown, intensive grazing, pasture raised, regenerative, "free from" President's choice line, ordering directly from producers

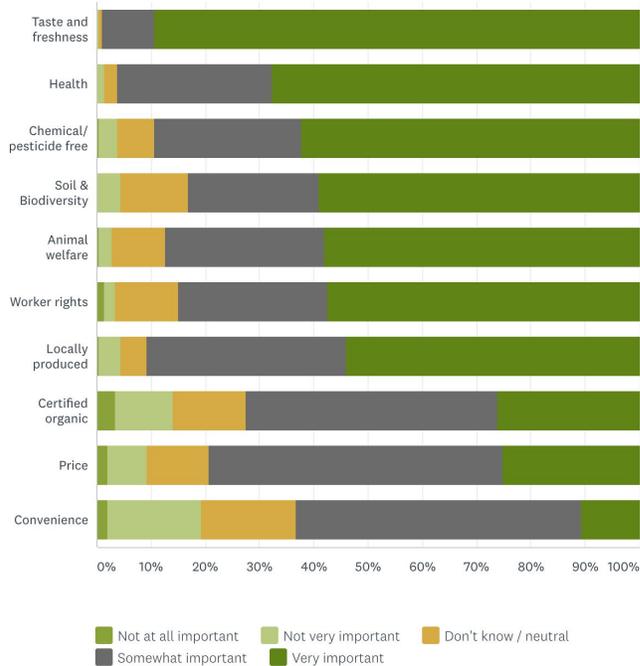
Factors Influencing Purchasing Decisions

Below is a clear indication that healthy land, ecosystems and beneficial farming practices are important to consumers, rating no chemical fertilizers and pesticides and soil health and biodiversity among their most important purchasing decisions.

Throughout the survey respondents demonstrated a strong preference for shopping locally and buying healthy food, perhaps organic, and expressed their interest and concern about emerging production related issues - including animal welfare and workers' rights. And while certified organic is somewhat or very important for 72% of respondents, the comparable figure for locally grown is 91%.

Q4: How important are the following factors in making your food and beverage purchasing decisions? Select importance for each factor.

Answered: 207 Skipped: 0



	NOT AT ALL IMPORTANT	NOT VERY IMPORTANT	DONT KNOW / NEUTRAL	SOMEWHAT IMPORTANT	VERY IMPORTANT	TOTAL	WEIGHTED AVERAGE
Taste and freshness	0% 0	0% 1	0% 1	10% 20	89% 185	207	4.88
Health	0% 0	1% 3	2% 5	29% 59	68% 140	207	4.62
Chemical free	0% 1	3% 7	7% 14	27% 56	62% 129	207	4.47
Soil & Biodiversity	0% 0	4% 9	13% 26	24% 50	59% 122	207	4.38
Animal welfare	0% 1	2% 5	10% 20	29% 61	58% 120	207	4.42
Worker rights	1% 3	2% 4	12% 24	28% 57	57% 119	207	4.38
Locally produced	0% 1	4% 8	5% 10	37% 76	54% 112	207	4.40
Certified organic	3% 7	11% 22	14% 28	46% 96	26% 54	207	3.81
Price	2% 4	7% 15	12% 24	54% 112	25% 52	207	3.93
Convenience	2% 4	17% 36	17% 36	53% 109	11% 22	207	3.53

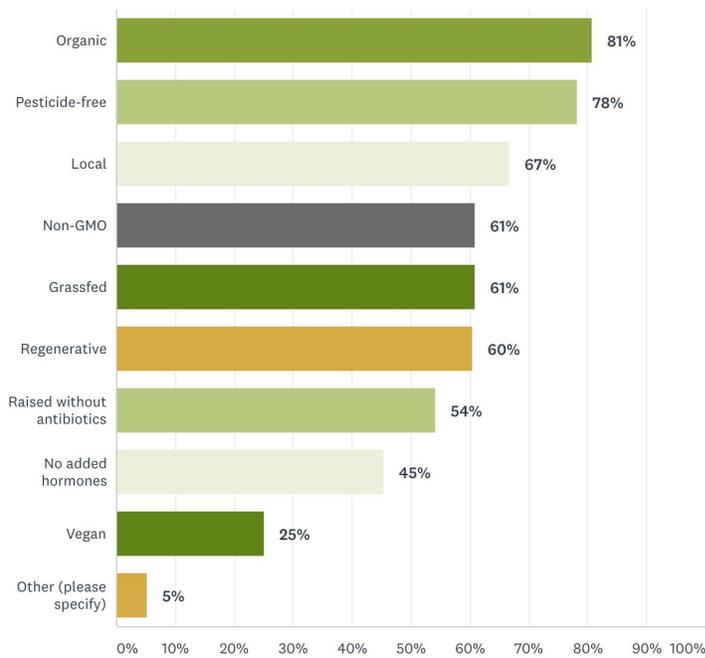
Label Association

It appears that in a competitive marketplace that abounds in marketing claims and promises, the word organic is the top signifier of “environmentally-friendly outcomes” at 81%. It is followed closely by “pesticide-free” with 78% and “local” at 67%.

“Regenerative” stands alongside “non-gmo” and “grassfed” with six in ten linking it with positive environmental impacts.

Q5: Which food labels do you associate with environmentally-friendly outcomes? Select all that apply.

Answered: 207 Skipped: 0



ANSWER CHOICES	RESPONSES	
Organic	81%	167
Pesticide-free	78%	162
Local	67%	138
Non-GMO	61%	126
Grassfed	61%	126
Regenerative	60%	125
Raised without antibiotics	54%	112
No added hormones	45%	94
Vegan	25%	52
Other (please specify)	5%	11
Total Respondents: 207		

Other: Biodynamic farmed, no glyphosate herbicide, pastured, sustainably sourced, bee/ocean friendly, “cool” produced (ie: grown with biochar)

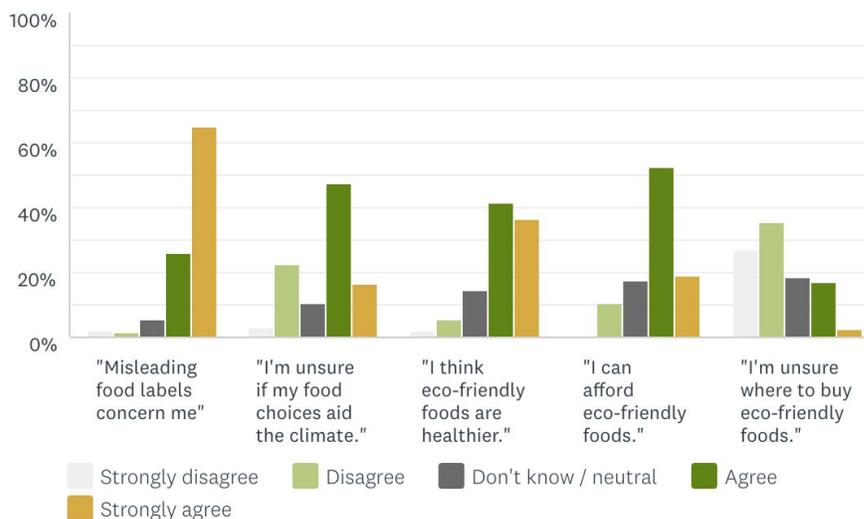
Location, Affordability and Implications

Respondents expressed strong concern for misleading food labels and they see a direct connection between their own good health and environmentally friendly foods. Not only do the majority of these shoppers know where to buy it, 72% say they can afford it. However, the stumbling block is matching desire to good choices - almost two thirds (64%) agree or strongly agree that “it’s hard to know whether the choices I make are good for the climate”.

Q6: How much do you agree or disagree with the following statements? Select level of agreement for each statement.

Answered: 207 Skipped: 0

	STRONGLY DISAGREE	DISAGREE	DONT KNOW / NEUTRAL	AGREE	STRONGLY AGREE	TOTAL	WEIGHTED AVERAGE
"Misleading food labels concern me"	2% 4	1% 3	5% 11	26% 54	65% 135	207	4.51
"I'm unsure if my food choices aid the climate."	3% 6	23% 47	11% 22	47% 98	16% 34	207	3.52
"I think eco-friendly foods are healthier."	2% 4	5% 11	14% 30	42% 86	37% 76	207	4.06
"I can afford eco-friendly foods."	0% 1	11% 22	17% 36	53% 109	19% 39	207	3.79
"I'm unsure where to buy eco-friendly foods."	27% 56	35% 73	18% 38	17% 35	2% 5	207	2.32

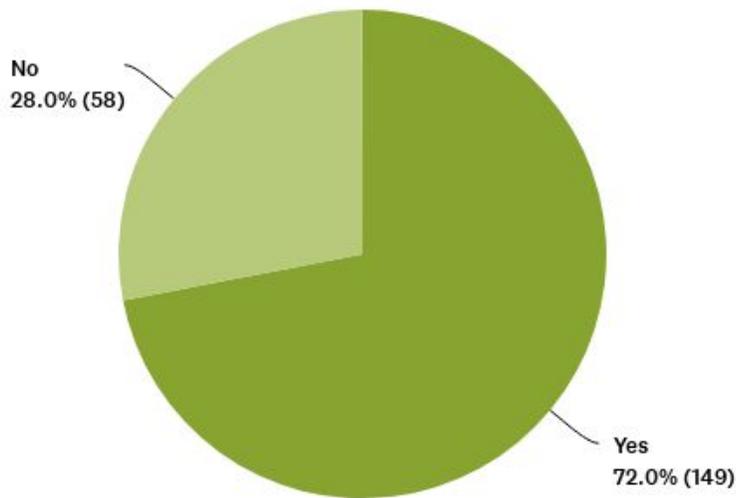


Awareness of Regenerative Agriculture

Over seven in ten (72%) of shoppers claim they are familiar with the term “regenerative agriculture”. As noted previously in question 5, most of these respondents (60%) associate regenerative agriculture labels/claims with environmental benefits.

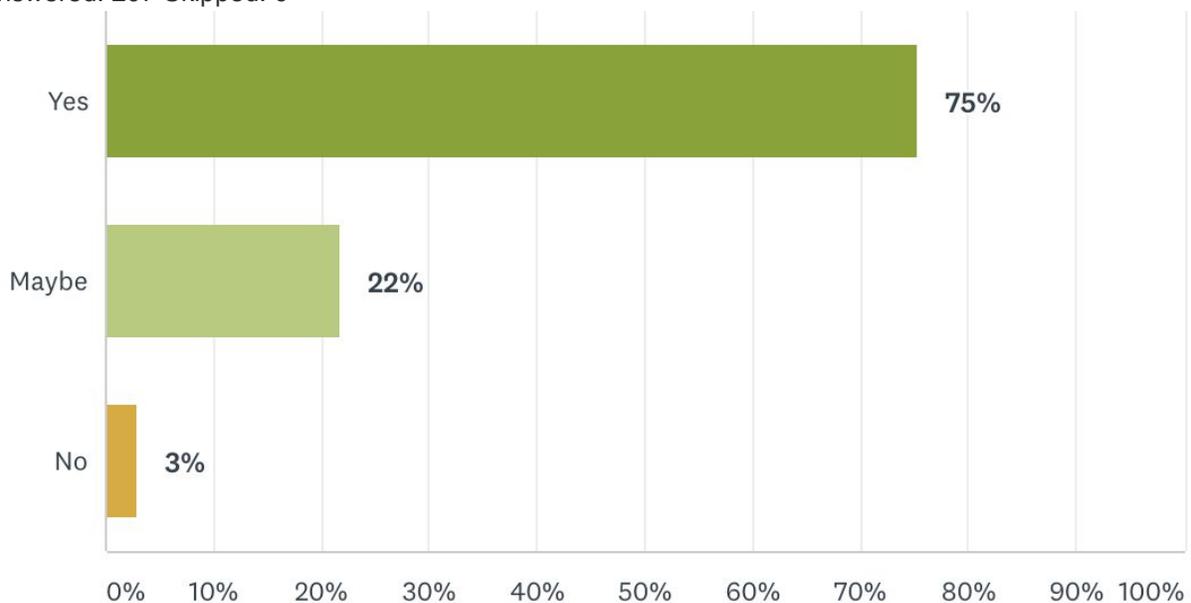
Q7: Have you heard about the term "regenerative agriculture"?

Answered: 207 Skipped: 0



Q8: Are you interested in regenerative agriculture?

Answered: 207 Skipped: 0

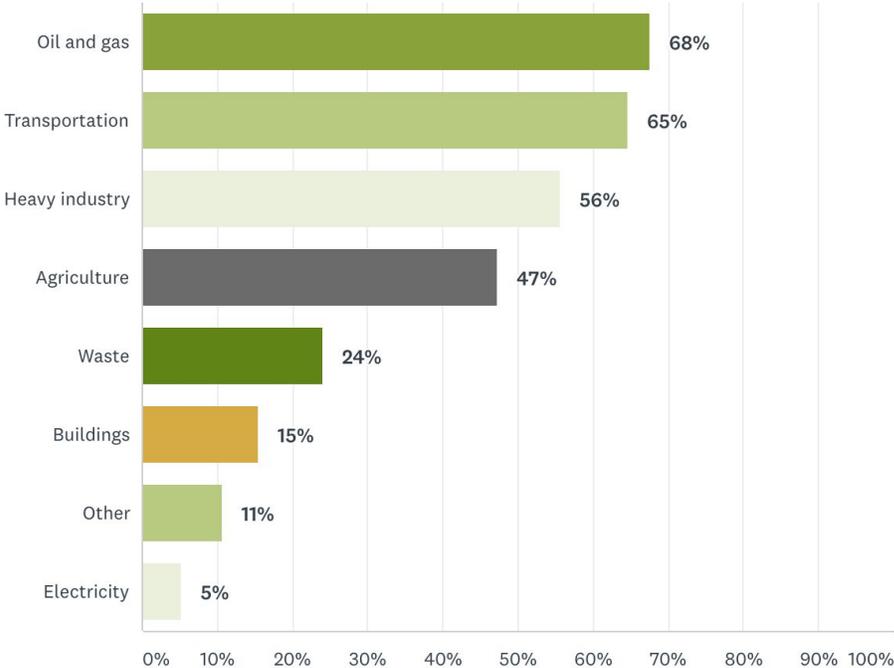


Perceived Largest Greenhouse Gas Contributors

At least six in ten shoppers believe that oil and gas and transportation eg. aviation are the two biggest emitters of greenhouse gas. Heavy industry and mining stands third in line as a major culprit with agriculture in fourth place. Just under half (47%) of participants think that agriculture is guilty on this score.

Q9: What economic sectors do you think are the biggest contributors to greenhouse gas emissions in Canada? Select your top three.

Answered: 207 Skipped: 0



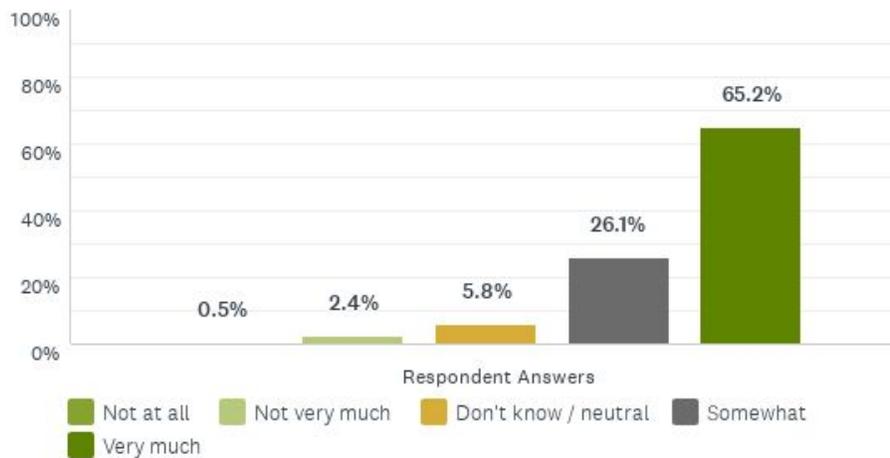
ANSWER CHOICES	RESPONSES	
Oil and gas	68%	140
Transportation	65%	134
Heavy industry	56%	115
Agriculture	47%	98
Waste	24%	50
Buildings	15%	32
Other	11%	22
Electricity	5%	11
Total Respondents: 207		

Purchasing Decisions Environmental Impact

Most shoppers draw a direct line between the food we buy and environmental impacts; they are convinced that it's a contributor to climate change. However, as noted previously (question 6) nearly two thirds are not certain that they have the knowledge to make the best choices.

Q10: How much do you think society's food purchasing decisions affect climate change?

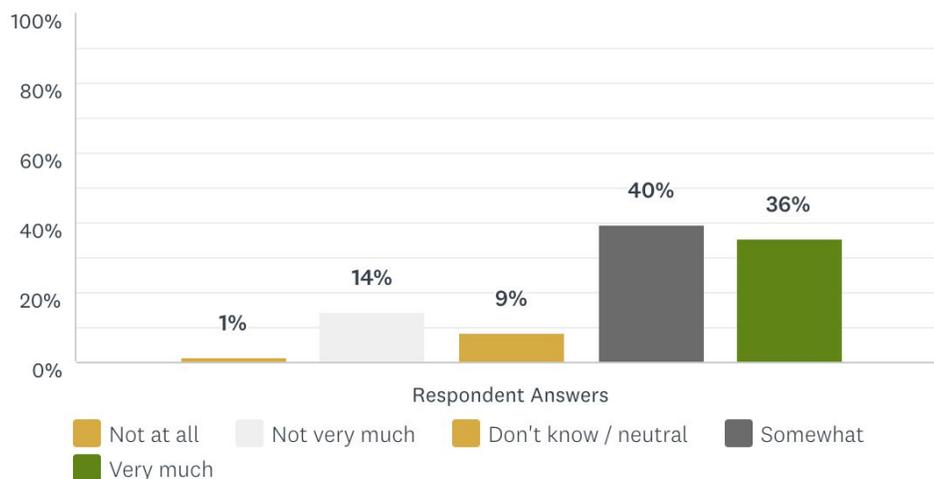
Answered: 207 Skipped: 0



	NOT AT ALL	NOT VERY MUCH	DON'T KNOW / NEUTRAL	SOMEWHAT	VERY MUCH	TOTAL	WEIGHTED AVERAGE
Respondent Answers	0%	2%	6%	26%	65%	207	4.53
	1	5	12	54	135		

Q11: How much do you think your food purchasing decisions affect climate change?

Answered: 207 Skipped: 0

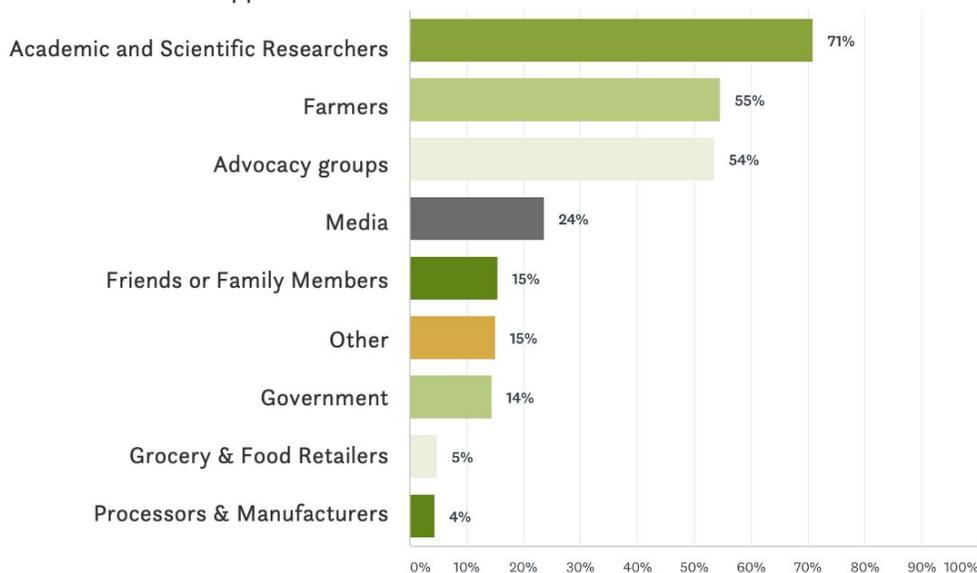


Trusted Sources for Food Information

These shoppers demonstrate their distinctness in their commitment to relying on useful, trustworthy information experts with academic and scientific researchers topping the list, followed by farmers and then advocacy groups. The usual influencers such as media/social media and friends and family play a more minor role in influencing consumers alongside low scoring government, food retailers and processors.

Q12: What are your top trusted sources for information relating to food? Select up to three.

Answered: 207 Skipped: 0



ANSWER CHOICES	RESPONSES	
Academic/scientific researchers	71%	147
Farmers	55%	113
Advocacy groups	54%	111
Media	24%	49
Friends or family members	15%	32
Other (please specify)	15%	31
Government	14%	30
Grocery & Food retailers	5%	10
Processors & Manufacturers	4%	9
Total Respondents: 207		

Other:

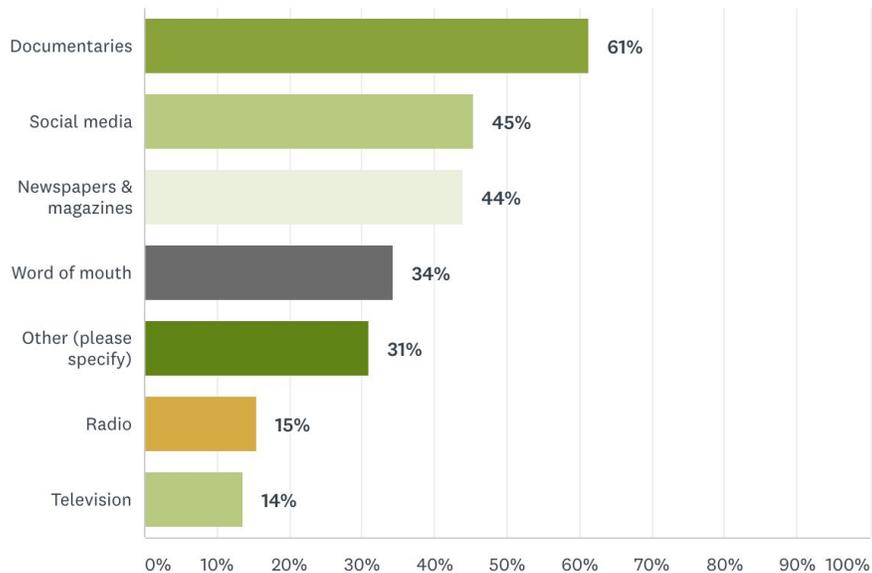
farm/food related media, agriculture organizations, alive magazine, personal research, influencers, books, health/green websites, agricultural organizations, nutritionist, naturopathy, internet communities/reviews, organic certification/farmers

Primary Sources for Food Information

Information is gleaned or sought from several sources with documentaries surprisingly leading (61%), social media following at some distance alongside print (newspapers, magazines) and then word of mouth, radio and television.

Q13: What are the primary ways you obtain information relating to food? Select up to three.

Answered: 207 Skipped: 0



ANSWER CHOICES	RESPONSES	
Documentaries	61%	127
Social media	45%	94
Newspapers & magazines	44%	91
Word of mouth	34%	71
Other (please specify)	31%	64
Radio	15%	32
Television	14%	28
Total Respondents: 207		

Other:

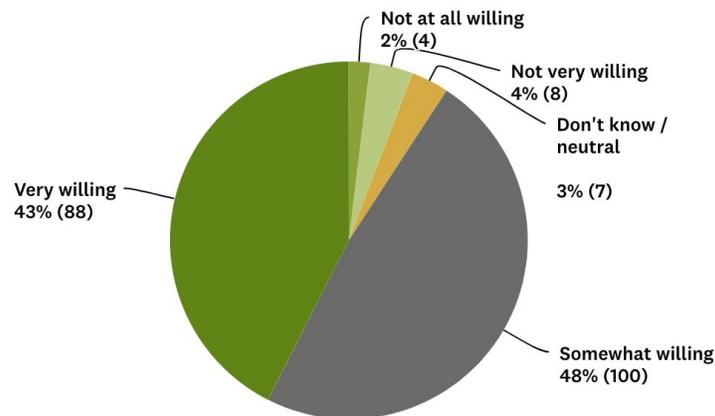
Research, health communities, agriculture organizations, online publications, farmers, general research (ie. internet), food advocacy groups, books, academic/scientific research, professional associations & members, personal experience, nutritionist, podcast, environmental organizations, alternative media, influencers, doctors

Willingness to Pay a Premium

Consistent with previous responses, most study shoppers claim they are willing to pay more for environmentally-friendly food.

Q14: How willing are you to pay more for environmentally-friendly food products?

Answered: 207 Skipped: 0

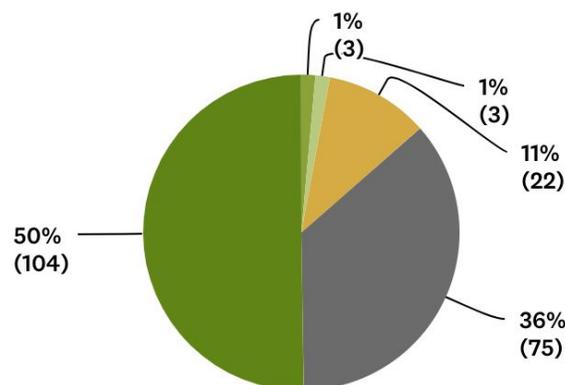


Purchasing Based on Positive Effects on Climate Change

A large majority (86%) of shoppers say that they would be “much more likely” or “more likely” to buy food labeled as “regenerative” if it helps reverse climate change. Most of the remainder are unsure.

Q15: If regenerative agricultural practices could help reverse climate change, would this make you more or less likely to purchase products with a "regenerative" label?

Answered: 207 Skipped: 0



	MUCH LESS LIKELY	LESS LIKELY	DON'T KNOW / NEUTRAL	MORE LIKELY	MUCH MORE LIKELY	TOTAL	WEIGHTED AVERAGE
Respondent	1%	1%	11%	36%	50%		
Answers	3	3	22	75	104	207	4.32

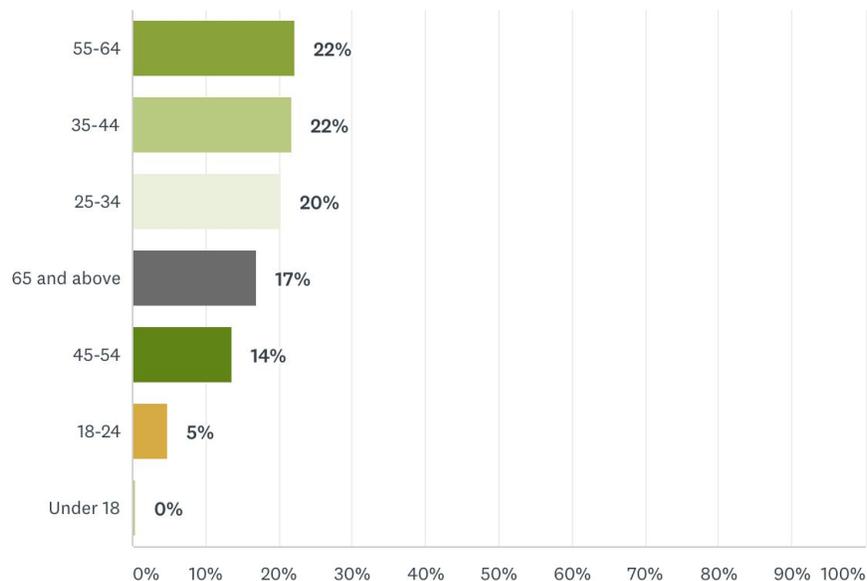
Q16: Do you have any final comments or thoughts to share?

Answered: 62 Skipped: 145

- Need more education
- There are too many labels
- I am against animal based agriculture
- Need more awareness
- Need to increase in buying local
- We need more support for farmers
- Would like to see more access to regenerative agriculture
- I do not believe in climate change
- Regenerative agriculture needs a definition
- Would like to know the workers conditions & rights
- We need to clarify food labels based on what standards they follow
- There are cost barriers (ie: cannot afford food that are a product of regenerative agriculture)
- I am curious about the results of this survey
- What about permaculture?
- Regenerative agriculture can only help climate change to an extent
- We need to incentivize other practices (demeter certification, biochar farming)
- Finding neutral information related to food is difficult

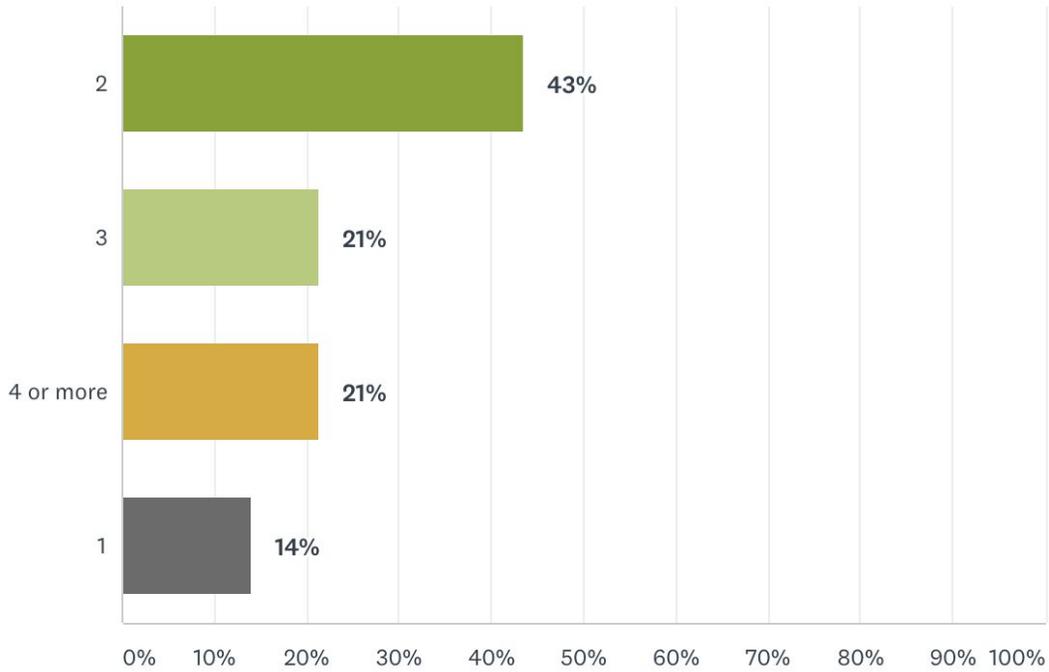
Q17: How old are you?

Answered: 207 Skipped: 0



Q19: How many people (including yourself) live in your household?

Answered: 207 Skipped: 0



Q20: How many people under the age of 18 live in your household?

Answered: 207 Skipped: 0

