



The Strategic Counsel

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**Executive Summary
Consumer Views of
Genetically Modified Foods**

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Executive Summary

This report presents the findings from a comprehensive research program which was undertaken on behalf of Health Canada in March 2016 to gauge Canadians' views on genetically modified (GM) foods and issues related to the application of science and technology in food production and manufacturing. Please note that the term "GM foods" is primarily used in this report, although at times the expression "GMO" (Genetically Modified Organism) is also referenced, as this was used by many of the research participants.

A. Context

Over the years, public opinion research has shown that many Canadians are sceptical of, if not outright opposed to, GM foods, with substantial proportions among the public expressing intense concern about the impact of GM foods on human health and the environment. Health Canada thought it was prudent to obtain a more current reading on public opinion with a view to identifying and addressing specific gaps in Canadians' understanding and concerns with respect to GM foods. The findings are intended not only to provide Health Canada with a more up-to-date understanding of Canadians' attitudes and behaviours related to GM foods, but also to inform communications activities and specifically any areas of concern raised by the general public.

A hybrid methodology (both qualitative and quantitative components), including 10 focus groups (two in each of five centers including Halifax, Toronto, Quebec City (in French), Saskatoon and Vancouver) and an online survey of n=2,018 respondents, was designed and executed with all fieldwork taking place between March 9th and March 30th, 2016. The focus of this research program was designed to assess broad views and concerns with respect to the application of science and technology in food production and manufacturing and, more specifically, Canadians' views on GM foods in general. As such, the results are also relevant to understanding consumers' views on the wider application of science and technology within the agricultural and food production/manufacturing sectors. The research also offered useful insights applicable to the development of broader educational, outreach and communications initiatives aimed at informing Canadians about Canada's food safety and regulatory processes.

Note to the Reader

Qualitative research is designed to reveal a rich range of opinions and interpretations rather than to measure what percentage of the target population holds a given opinion. These results must not be used to estimate the numeric proportion or number of individuals in the population who hold a particular opinion because they are not statistically projectable.

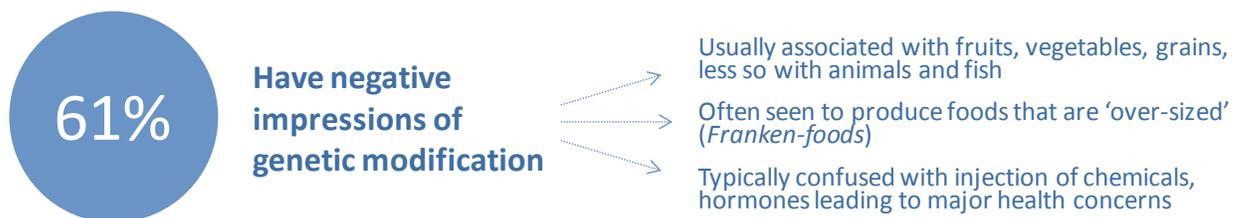
The findings should be interpreted as directional only in nature.



B. Key Findings

Based on the results of this most recent research study, consumers' understanding and impressions of GM foods could be described as not that well formed, as demonstrated by the lack of detailed knowledge that was evident in the focus groups. To date, views have been principally shaped by controversial (less than positive) media coverage, and any confusion or negative views which do exist are often reinforced by the ongoing activities of anti-GMO advocates and environmental groups. These groups appear to be quite adept at leveraging social media and playing into public concerns about corporate malfeasance (this is a theme that reoccurs in many recent opinion research programs). In respect of the latter issue, virtually no other company has been as inextricably linked to the GMO debate as Monsanto as a genetically modified seed producer (especially for Roundup Ready crops) combined with being the manufacturer of the Roundup herbicide itself. For focus group participants in particular, Monsanto was frequently invoked when participants were asked to name those things/issues they most associate with GM foods.

Consumers' initial response and reaction to the topic of GM foods is certainly not positive and clearly presents some formidable challenges for Health Canada communicators and policy-makers with respect to addressing the level of confusion, misinformation and generally low awareness/understanding that currently exists. A brief overview of the key findings from both the qualitative and quantitative phases of this research study is presented below along with a number of recommendations, for consideration.



There is both a science and communications gap.

Findings from the focus groups and results of the survey indicate that consumers' basic understanding of food science and technology is low. This is not surprising given a number of factors, including the shift from a more agrarian to more industrialized and urbanized society.

Consumers believe that genetic modification is a process which does or could include injecting fruits, vegetables, animals and food products with potentially hazardous materials such as hormones, antibiotics, steroids or other product enhancers which then fundamentally changes the nature and composition of the product. The term "Franken-food" came up in almost every focus group in the context of discussions about GM foods, although many consumers clearly know very little about the actual science of genetic modification.



It is clear that, for quite some time, there has been and continues to be an *information void* on this issue which has been rather successfully filled by the anti-GMO view. It was evident from the focus group discussions that the general population has a relatively low level of scientific literacy, and this finding was also confirmed in the quantitative survey. Further, there is very little specific knowledge of GM foods, genetic engineering, bio-technology or even older practices such as selective breeding. There also appeared to be minimal understanding of innovation in farming practices or the challenges that farmers and agri-business face in producing higher volumes at reasonable prices, meeting changing consumer preferences, and getting food products to market quickly while also being increasingly attendant to sustainable agricultural techniques and practices.

In addition, it appears that there has been some negative “leakage” from the ongoing stories on the GMO ban in the EU as well as protests about Monsanto’s efforts to control use of their genetically modified seeds. Importantly, it should also be noted that issues of genetic modification, organic farming, fish-farming, over-use of pesticides and chemical fertilizers and chemicals in food have become conflated.

At this time, consumers are not favourably disposed to GM foods.

Based on the feedback obtained in both the qualitative and quantitative components of this research study, communicating in any positive way on this topic will likely be met with strong and quite vocal resistance from the public and from anti-GMO groups in particular.

There was a strong consensus among most focus group participants that they were not favourably disposed to GMOs in any form, although it was equally clear that a focus on certain aspects of the regulatory, safety and approvals processes can to some extent ameliorate those who are either ‘sitting on the fence’ on this issue or moderately opposed. However, the extent of likely pushback cannot be under-estimated. From the survey, only 26% of respondents indicated they would be comfortable eating foods that have been genetically modified, and just 22% support the development and sale of GM foods in Canada. It is clear that significant efforts to inform and educate Canadians would be required in order to shift views in a more positive direction

The mostly negative reaction to GM foods among focus group participants was primarily an emotional response, as most participants had little relevant knowledge prior to their participation in the group discussion. This ‘current state’ was also borne out in the survey. The negative reaction was so strong that, even as more information was provided over the course of a two-hour discussion, it became apparent that a more specific explanation of GM foods could be counter-productive unless communications are clearly and simply crafted, and focused on addressing a very specific set of questions or concerns that the public has on this issue.

The term itself was demonstrated in the groups to generate fairly firmly rooted negative connotations. The survey results confirmed this with 61% of Canadians saying that when they hear the term ‘genetic modification,’ their thoughts and impressions are mostly *negative* (fully one-quarter (26%) say their impressions are *extremely negative*).



Views on GM foods cut across all demographics and regions.

One of the more striking findings in both the focus groups and the survey was that there was surprisingly little difference in opinions by region or key demographic groups (i.e., parents vs. general population, or older vs. younger Canadians). In the focus groups, however, there were two noteworthy exceptions:

- In Saskatoon, parents tended to lean more neutral to negative in their initial impressions of GM foods, while participants in the group representing a cross-section of the general population tended to view GM foods in a more neutral to positive manner. What was perhaps somewhat surprising in this location was that there was virtually no significant difference between Saskatoon and other locations in terms of their understanding of and views regarding GM foods. On balance, participants in this location were equally concerned about GM foods as in other locations.
- In Quebec City, participants seemed to exhibit greater confidence in the safety of GM foods following a review of various key facts and information contained in statements about GM foods made by Health Canada (which were tested and discussed with participants in each focus group). As with the groups in other locations, they responded positively to information which underscored Canadian collaboration with other countries and world organizations. What was different, however, was the extent to which providing facts and information tended to shift Quebec City participants' views in a more positive direction, perhaps more dramatically than was the case in other locations. However, this same effect is not specifically borne out in the results of the quantitative survey, in that residents of Quebec were no more or less persuaded by particular facts or information relative to other Canadians.

Overall, the opinions expressed highlight a difficult challenge for Health Canada – there are definitive and fairly widespread negative perceptions about GM foods. Indeed, the feeling is so evident that the term GMO/GM food could be seen as having become a third rail in the sense that any person or organization coming out in favour could be viewed in a negative, if not questionable or cynical light.

A basic question remains unanswered – why GM foods?

The massive anti-GMO movement, and accompanying volume of information, presents a significant challenge for Health Canada in terms of being a credible, neutral regulator in that there would be a strong likelihood that any decisions/announcements would be received through a conditioned lens. That said, however, there are significant opportunities to educate the public about the rationale for them. As a starting point, the public does not have a solid grasp as to why GM foods are being produced for sale in the Canadian market place. A strong rationale for GM foods would help, although it would not necessarily sway those who are adamantly opposed at the level of 'values' rather than 'knowledge.' Almost half of survey respondents (48%) agreed with the statement *'I don't really understand why we need to produce genetically modified foods for consumers in Canada.'* In the absence of responding to this basic question, consumers see little need to take what they view as unnecessary risks to their health, and the environment, without a solid case being made in regards to the benefits, at both the personal and broader societal levels.



No strong rationale for GM foods has been presented to the public which exacerbates existing questions and concerns.



Currently, the arguments that genetic modification is vital to producing foods that are more affordable, to ensuring Canada's food supply, and to sustainability carry little to no weight among consumers. Consumers have some sympathy and appreciation for these arguments as they apply to the developing world where population growth and the availability of arable land are viewed as creating significant challenges, but the same arguments hold little sway in Canada which continues to be seen as one of the world's leading agricultural producers.

Moreover, consumers are simply not convinced that GM foods are as safe or safer, as tasty or tastier, or as nutritious or more nutritious relative to comparable non-GM foods. At the present time, most consumers view the marketplace for GM foods as one that has been created not to address consumer demand or evolving preferences, but principally as a means of increasing corporate profits (54% agree with this idea). Here again, the legacy of companies like Monsanto continues to underpin and reinforce this perception and this is also likely further exacerbated by a general mistrust of big business, and large agri-businesses and factory-farms, in particular.

While price is the main driver of food purchases, the issue of GMOs lurks just below the surface.

For many consumers the issue of GM foods is not necessarily top-of-mind at the time they are shopping for and selecting foods. However, it was clear both in the focus groups and from the results of the survey, that the issue is an important secondary consideration. When specifically asked, 73% of consumers indicated they have concerns about the use of genetic modification in food production and manufacturing, just slightly less than the number who are concerned about herbicides and pesticides (82%) and the use of antibiotics and growth hormones (80%). The latter two issues surfaced very quickly in focus group discussions when consumers were asked about what they consider when making food purchases. However as we noted earlier, there is also a tendency to conflate genetic modification with food additives (note that in this context additives as seen by research respondents include hormones, preservatives, etc.), which has the effect of reinforcing negative views and stereotypes about food production.



Consumers support labeling of GM foods.

Consumers have strong feelings about being able to identify GM foods when they are shopping – 78% say that all genetically modified foods should be clearly labeled as such on the package. However, to put this in perspective, focus group participants appeared more concerned about choosing healthy options and being able to identify place of origin, while very few voluntarily suggested that having foods labeled as genetically modified or not was the kind of information they were actively looking for when making their choices.

At the same time, in focus groups, participants did voice their desire to be able to make informed choices, based on information. There was a prevailing belief among participants that there should be greater transparency to consumers and, once raised, many questioned why government in particular should be resistant to providing consumers with more information that would help them make more informed decisions. Moreover, survey results revealed that, if consumers had a choice, most (62%) would elect to purchase a non-GM food over a genetically modified food.

The Government of Canada is a trusted source of information on this topic, but there are potential areas of vulnerability to be aware of.

A range of spokespersons are viewed as credible or trustworthy on the topic of food safety and nutrition, mostly experts who do not have a vested interest in the production and sale of GM foods in Canada. These include nutrition and/or health professionals, farmers, international organizations and the Government of Canada. While 70% of Canadians view the Government of Canada as a trustworthy source, just 54% said the same about scientists working for food products companies.

The focus groups offer some further context within which to interpret these results. There was a real concern among focus group participants that scientists should be clearly positioned as neutral, to the extent that their safety assessments are not funded by industry and that the data they use to conduct safety evaluations is also gathered in an unbiased or highly controlled manner. On this latter point, there is a concern that, while it may be standard practice for industry to share data for review by Government scientists, this data may in fact have been manipulated to favour industry. As such, there is a desire for Government scientists to be able to demonstrate that a very rigorous, scientific and unbiased process has been followed. Further investigation as to what might promote higher public trust in the assessments performed by Government scientists could offer additional insights. For example, to what extent would the public be more comfortable knowing that, even if data came from industry, multiple independent data sources were examined?

The bottom line is that simply indicating Government scientists are highly engaged in lengthy and thorough assessment processes does offer some level of reassurance to the public, but this is tempered to a certain extent when the public learns that the evidence/data Government scientists are working with has been provided by the very same company or companies seeking the approval.

Interestingly, the survey results show mixed levels of trust in environmental activists – half view them as either somewhat or very trustworthy and half say they are not very or not at all trustworthy. This result runs



somewhat counter to the conversations in focus groups where it was quite evident that anti-GMO activists, including environmental activists, did appear to be heavily influencing consumers and, in particular, those who expressed more concerns or negativity about GM foods. It may be that, when considered among an array of possible spokespersons, the role and influence of environmental activists is somewhat moderated, but that in the absence of information from other sources the positions of these groups may carry more weight.

Consumers respond favourably to a combination of messaging that stresses scientific rigour in safety assessments, reassures Canadians in terms of any risks to health, underscores the opportunities to produce foods with higher nutritional value, and weaves in some of the other broader societal benefits. Transparency in sharing the results of safety assessments is also favoured.

Consumers respond favourably to messaging which underscores the very rigorous scientific process but also stresses the benefits to be gained from the production and sale of GM foods. Comfort levels are also increased when consumers know they are able to access information online regarding safety assessments.

In the survey, respondents were asked two ‘ballot’ questions to assess their general openness to consuming GM foods. Prior to receiving any facts or information about GM foods, the assessment process or benefits, just one-quarter (26%) of respondents agreed that genetically modified foods are safe to eat and that they would be comfortable eating foods that had been genetically modified. After reading a series of facts and information about GM foods, respondents were asked about their level of agreement with these two statements and this rose to just over 40% in each case, a significant increase which can be attributed to exposure to this information. Specifically, analysis reveals that a combination of information relating to the approach to testing (including both the rigorous scientific process and the timeline), transparency about safety assessments, and linking Canadian processes and approaches vis à vis GM foods to international efforts, can help to shift views in a more positive direction.

From the focus groups, there was a clear consensus that international collaboration and comparisons to other countries, in terms of testing protocols and standards, is helpful, but to the extent possible, less focus should be placed on the U.S. as a comparator given the sense that their standards with respect to food safety and GM foods in particular are more lax.

MORE INFORMATION

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