



Agriculture and
Agri-Food Canada

2021 Canadian Agri-Awareness Initiative Qualitative Research Final Report

Prepared for Agriculture and Agri-Food Canada

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Ce rapport est aussi disponible en français.

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May 2021

This public opinion research report presents the results of qualitative research conducted by Earncliffe Strategy Group on behalf of Agriculture and Agri-Food Canada. The research was conducted in April and May 2021.

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Executive summary

Earnscliffe Strategy Group (Earnscliffe) is pleased to present this report to Agriculture and Agri-Food Canada summarizing the results of the qualitative research to inform the Canadian Agri-Awareness Initiative.

The 2019 Budget committed an investment of \$25 million over five years for Agriculture and Agri-Food Canada (AAFC) to develop a national consumer-focused campaign, now known as the Canadian Agri-Awareness Initiative (CAAI), to better connect Canadians with, and instill pride in, Canada's food system, its agriculture, and food products.

Public opinion research plays a crucial part in this initiative by providing a better understanding of Canadian consumer preferences and perceptions of the agriculture and food sector. The [2020 Buy Canadian Promotion Campaign Baseline Survey](#), which was conducted in July and August of 2020, was established to collect starting point results, to track potential changes in opinion throughout the initiative, and to help inform and shape the strategy. To follow this, the qualitative research with Canadian consumers explored reasons behind the quantitative survey results, including changes in perception during the COVID-19 pandemic.

The objective of this research was to gain deeper insights on the 2020 baseline survey results and to further explore Canadians' relationship with food, and the agriculture and food sector. The contract value for this project was \$131,832.39 including HST.

To meet these objectives, Earnscliffe conducted a comprehensive wave of qualitative research. The research was comprised of 18 focus groups with Canadian consumers aged 18 and older representing different regions across the country and a variety of specific populations. These specific populations included: youth (18-34), non-youth (35+), vulnerable populations (low socio-economic status), racialized Canadians, Indigenous peoples, and Canadians in official language minority communities. All participants were screened to ensure they either had a positive, neutral or slightly negative impression of Canada's agriculture and food sector and had main or joint responsibility for grocery shopping in their households. Of the 18 focus groups, five were conducted in French while the rest were conducted in English. The focus groups were conducted online between April 26 and May 3, 2021. The groups took on average 90 minutes.

It is important to note that qualitative research is a form of scientific, social, policy, and public opinion research. Focus group research is not designed to help a group reach a consensus or to make decisions, but rather to elicit the full range of ideas, attitudes, experiences, and opinions of a selected sample of participants on a defined topic. Due to the small numbers involved, the participants cannot be expected to be thoroughly representative in a statistical sense of the larger population from which they are drawn and findings cannot reliably be generalized beyond their number.

The key findings from the research are presented below:

- There seemed to be a deep appreciation for the Canadian agriculture and food sector. As participants reflected on Canadian agriculture, they generally conjured up positive images of vast and varied farmlands and products (namely, grains, fruits/berries, vegetables, meat, and dairy). For food,

participants conjured up words that described the function food performs, a desire to eat healthy, and feelings toward food.

- There was also an appreciation for the magnitude of the challenges facing the sector. Participants spoke of the challenges posed by weather and environmental changes (climate change), soil quality and land erosion, water quality and supply, insects/pests, larger farms acquiring smaller farms, competition driving prices down leaving less room for profit, and the need to feed a growing population.
- Despite these challenges, the level of trust in Canada’s food system does not seem to have changed much over the past year and most continue to hold generally positive impressions.
- What has seemingly changed over the past year, and mainly as a result of the COVID-19 pandemic, was a desire to buy local (and/or Canadian foods). Some focus group participants suggested the pandemic has stirred in them an increased desire to support local businesses.
 - Interpretations of the term “local food” varied. For some, local referred to foods available in their vicinity (within a certain distance from their homes). For others, it referred to products from their province or region; and, for others still, local referred to products from Canada.
- In addition to supporting local businesses and ensuring the viability of the local economy, participants said they shop local (and/or Canadian) because the quality (taste and freshness) seems to be better.
- For most audiences, perceptions of Canadian farmers also tended to be quite positive. The majority of participants trust Canadian farmers, especially local farmers who live nearby and/or those with smaller family farm operations. They are described as: hard-working, dedicated, family, generation, heritage, entrepreneurial, independent, innovative, conservative, proud, simple, and essential.
 - The one audience that seemed to display slightly more negative sentiments toward Canadian farmers were Indigenous participants, particularly those in Western Canada. When asked what comes to mind when thinking of Canadian farmers, some of the sentiments included: treaties, settlers, capitalism and being misled.
- There also appeared to be a lot of compassion for Canadian farmers and a sense that they were under-appreciated, especially those with smaller operations.
- Interestingly, the vast majority of participants had visited a farm including: those who had spent time living and/or working on a farm, those who had visited with school as a child, or those who visit now, especially with their own children. Whether they visited a local vegetable/berry/fruit, grain, or dairy farm, almost all came away with an enriching experience and improved impressions.
- While most participants were not all that knowledgeable about the specific impacts of farming on the environment, there was certainly broad understanding that it did have an impact. Those who felt more knowledgeable spoke of the quality of the soil and land erosion, impacts of climate change on farming, the use of pesticides and the run-off into our water systems, among other things.
- The overwhelming majority of participants believe the government should play a role in agriculture and food. When asked whether the government’s role should be about promoting the farmer or the food, responses were mixed. Some felt the government should promote both equally because the two were so heavily intertwined. Others felt given this link, the government could promote either one as the net result would be the same; whereas, some felt the government should promote farmers as the

product of their labour is food. Participants reasoned that ensuring farmers are living up to government legislated standards ensures the quality of our food.

- Food waste was a topic that was relevant to many participants and they seemed to be preoccupied with the amount of food waste in grocery stores and restaurants. Most participants indicated they were trying to actively reduce food waste in their own homes in myriad ways.
- The concept of food security was not as well understood. Some interpreted it as the quality (safety) of food available in stores (specifically, not past its expiration date, food recalls due to salmonella), whereas others interpreted it as supply chain issues impacted by factors such as the price and availability of food.
- In terms of information needs, the kinds of things participants would like to know more about included (but were not limited to):
 - Costs to farm, challenges faced, and a typical day in the life of a farmer;
 - Impact of farming on the environment, including practices to lower greenhouse gas emissions;
 - What is in food, including in plant-based foods;
 - Where and how food is grown, including better identifiers on labels;
 - Technology used in farming and how it has changed;
 - Dispelling myths about farming and agriculture;
 - What are the criteria and regulations for genetically modified organisms (GMOs);
 - Methods used/alternatives to pesticide use; and,
 - What role government plays in supporting and/or regulating farmers, whether they provide any support, and how much influence the government has on establishing prices.
- There was also interest in better understanding the harvesting and production of Indigenous or culturally diverse foods, especially among those who knew very little.
 - Worth noting, interpretation of the term “Indigenous food” varied widely with some having no idea what it was, and others interpreting it as a variety of foods such as bannock, game, and soups, or, foods that were naturally found in a particular vicinity.
- The source the majority of participants deemed most credible for information about Canada’s food and agriculture, and from whom they would most like to hear, is farmers. In addition to farmers, the sources that were most often deemed credible included: researchers, scientists, academics, nutritionists/dietitians, and the Government of Canada. Indigenous participants would also welcome information from Indigenous groups.
- When asked which sources they felt were not credible, most appeared to mention sources they thought might have an inherent bias. This included: doctors, journalists/media, elected officials, celebrities, celebrity chefs, documentaries, grocery stores, and some environmental groups.

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I hereby certify as a Representative of Earncliffe Strategy Group that the final deliverables fully comply with the Government of Canada political neutrality requirements outlined in the Communications Policy of the Government of Canada and Procedures for Planning and Contracting Public Opinion Research. Specifically, the deliverables do not include information on electoral voting intentions, political party preferences, standings with the electorate, or ratings of the performance of a political party or its leaders.

Signed:

Date: May 20, 2021

A handwritten signature in black ink, appearing to read "Stephanie Constable".

Stephanie Constable
Principal, Earncliffe