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AAFC Canadian Consumers Survey - Wave II (2023)

Executive Summary

Prepared for Agriculture and Agri-Food Canada

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Canada

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This executive summary presents the results of an online survey, focus groups and in-depth interviews conducted by Earnscliffe Strategy Group on behalf of Agriculture and Agri-Food Canada. The fieldwork was conducted in December 2023.

Cette publication est aussi disponible en français sous le titre : Sondage auprès des consommateurs canadiens de 2023-2024 (vague II) : Résumé du rapport

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Executive summary

Earnscliffe Strategy Group (Earnscliffe) is pleased to present this report to Agriculture and Agri-Food Canada (AAFC) summarizing the results of quantitative research undertaken to understand how consumer attitudes have evolved over the past few years.

Budget 2019 committed an investment of $25 million over five years for Agriculture and Agri-Food Canada (AAFC) under the Food Policy to "make Canadian food the top choice at home and abroad"; known as the AgriCommunication initiative.

In 2020, Earnscliffe conducted the first wave of this research, "2020 Buy Canadian Promotion Campaign Baseline Survey"; a baseline survey to understand consumer perceptions and to inform a marketing campaign to enhance public trust and increase appreciation and pride in the contribution of farmers and the food industry. This was an online survey of 2,005 Canadians aged 18 and older who hold at least some of the household grocery buying responsibility. The survey was conducted between July 28th and August 3rd, 2020, in English and French, according to respondents' preference.

At this time, AAFC would like to assess whether consumer attitudes have evolved. The objective of the research is to assess consumer attitudes over the duration of the AgriCommunication Initiative. This phase of research will be used to evaluate the effectiveness of the AgriCommunication Initiative and support the objective to share information and engage with the agriculture and agri-food sector about the evolving expectations/behaviours of Canadian consumers. The contract value for this project was $79,693.25 including HST.

The specific objectives of the research were to explore:

- Consumer grocery shopping frequency, behaviours and preferences including deciding factors, impressions, and desirability of Canadian grown and produced foods, as well as how consumers determine whether something is Canadian made.
- Impressions, knowledge, and familiarity with Canada's agriculture and food sector as well as sources of concern, pride, and information relating to Canada's food and agriculture.
- Views on household food waste in Canada including concerns, causes and potential solutions.

To meet these objectives, Earnscliffe was retained to conduct a nationally representative online survey of 2,011 Canadian adults between December 8th and 14th, 2023, in both English and French. All respondents were 18 years or older and responsible for at least some of a household's grocery shopping. The survey took an average of 15 minutes to complete. A full description of the sample frame, data cleaning process, and weighting are outlined in the Quantitative Methodology Report (Appendix A). The questionnaire used is provided in Appendix B. Since a sample drawn from an Internet panel is non-probabilistic in nature, the margin of error cannot be calculated for this survey.

The key findings of this research are presented below including key tracking results where questions from the 2020 survey were repeated.

Impressions of Canada’s agriculture and food sector

- Canadians remain far more likely to have a positive than a negative impression of Canada’s agriculture and food sector, though the number who say they have a positive impression is down 10% (61% versus 72%).

- Compared to 2020, there has been a 12% drop in those who believe they are somewhat knowledgeable with Canada’s agriculture and food sector, and a corresponding increase in the proportion feeling they are not very knowledgeable (42% versus 29%).

- The data show that knowledge and impression are highly and positively correlated. The more knowledgeable of the sector one feels they are, the more favourable an opinion they tend to hold of it. This positive correlation means that cultivating higher levels of knowledge will likely help to maintain a high degree of favourable opinion towards the sector.

- Familiarity with both farming and ranching (45%, down 9%), as well as food and beverage processing and manufacturing (38%, down 4%), has softened since 2020.

- Most respondents (88%) feel that farmers and ranchers are at least moderately trustworthy, and the majority feel the same of food and beverage manufacturers (68%) and retailers (59%). While few hold a negative opinion on trustworthiness of farmers and ranchers, 37% feel that food and beverage retailers are not very or not at all trustworthy.

- Between half and two-thirds of respondents trust farmers in the care of their animals (66%) and in their use of fertilizers and pesticides (54%).

- A strong majority of respondents agree that it is important that Canada’s agriculture is growing and successful (84%, down 3%), Canada’s farmers and ranchers are a source of pride (74%, down 3%), and that they are proud of the food and beverages produced in Canada (68%, down 10%). Compared with 2020, the number of respondents who agree with each has fallen.

- A slight majority agree that Canadian farmers are good stewards of the environment (56%, down 2%) and that Canadian farming is environmentally responsible (52%, down 2%).

- More respondents disagree than agree that genetically modified foods do not pose any risks to their health (38% versus 27%) and that Canadian food and beverage retailers are trying to stabilize food prices (44% versus 20%).

- Respondents were shown a list of ten potential areas of concern in Canada's agriculture and food sector and were asked to rate their level of concern with each. Concern is notable for each, with at least four-in-ten respondents who say they are moderately or very concerned.
    - Among all areas tested, three areas stand out in terms of level of concern. A strong majority of respondents say they are concerned with the affordability of food in Canada (80%, up 29%), the amount of food wasted (71%), and the impact of plastic packaging on the environment (60%).
    - Compared to 2020, the proportion of respondents who say they are concerned has risen among every measure tested. Notably, level of concern about the affordability of food has risen 29% (from 51% in 2020 to 80% in 2023).

Impressions of Canadian food

- Compared to 2020, fewer respondents feel that the quality of food and beverages from Canada is excellent (17%, down 16%), and more now feel it is average (24%, up 11%).
- Over half of respondents (58%, down 5%) agree that Canadian produced foods are better for the environment than imported foods.
- Fewer respondents agree that there are enough Canadian produced food options available (44%, down 11%) or are willing to pay more for foods produced in Canada (36%, down 13%).
- More respondents disagree than agree that Canadian produced foods are affordable to buy (36% versus 25%).
- Up since 2020, half of respondents say they sometimes (34%, up 3%) or rarely (16%, up 5%) look for food and beverages from Canada. Four-in-ten say they always (9%, down 5%) or often (32%, down 6%) do so. Conversely, 6% (up 1%) say they never seek out Canadian produced food and beverages.
- Looking at the specific products produced in Canada, fewer respondents this year say they always or often purchase them. Fresh meat (51%, down 8%) and produce (50%, down 12%) remain the Canadian product sought out most often.
- Nearly six-in-ten (58%, down 3%) respondents believe that it is easy to identify food and beverages that are produced in Canada, which represents no meaningful change since 2020.
- Most respondents (83%, down 4%) say they read the product label to determine whether a food or beverage is from Canada. Fewer use signage at a given display (42%, down 4%) or buy locally (14%, down 3%).

Views related to food policy

- The majority (62%) of respondents believe that the best before and expiration dates mean different things to them, which is consistent with 2020 (61%).
- Increasing 6% since 2020, one-quarter of respondents (25%) say they have little or no food waste in their household.
- Only one-in-ten respondents (9%) say they have not made any changes to reduce their food waste. Conversely, the most common changes made are eating home cooked meals more often (44%), making a grocery list (43%), and meal planning (41%).
- Among those who say they have made changes to reduce food waste, the majority (60%) have done so over economic concerns, while fewer say moral (23%) or environmental (13%) concerns were the main catalyst.

Factors driving purchase decisions

- The vast majority of respondents (72%) say that while price is usually an important factor in their purchase decisions, there are also other important factors.
- Among those for whom price is not usually the only factor, a majority say quality (76%), taste (69%), and nutritional value (54%) are among the top five factors that drive their food purchase decisions. Proximity is also an important factor, with Canadian (33%) and locally (30%) produced and grown foods making up the top-five for three-in-ten respondents.
- Among those for whom price is not usually the only factor, when given 100 points to allocate to their most important factors (up to 6) that drive purchase decisions, the average respondent gives price (at 39) nearly twice as many points as any other factor. Rounding out the top five factors based on average point allocation are being vegan or vegetarian (21), taste (20), quality (19), and nutritional value (18).
- Only 2% of respondents say they are not concerned about rising food prices. Conversely, seven-in-ten respondents say they are concerned about the rising price of fresh meat (70%) and produce (69%), while half are concerned about the rising cost of dairy (50%).
- The average household spends $580 on food per month; however, more spend $500 or less (50%) than spend more than $600 (28%).
- Three-in-ten respondents (29%) claim to eat a special diet, including nearly one-in-ten who eat a reduced-meat diet (9%), or plant-based diet (7%). Dairy- and gluten-free diets are also common (6%).
- Among those who have a special diet, one-in-five (20%) do so to accommodate an intolerance, allergy, or believe it is healthier (18%).

- Among all the behaviours tested, those that satisfy an intention of saving money or reducing waste are the most common among respondents, including checking flyers (56%), trying to reduce their monthly grocery bill (56%), and being careful about buying and preparing food to reduce waste (47%).

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I hereby certify as a representative of Earnscliffe 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: February 23, 2024

Stephanie Constable
Principal, Earnscliffe