Agriculture and
Agri-Food Canada

2019 Consumer Perceptions of Food

Qualitative Research Report

Prepared for Agriculture and Agri-Food Canada

Supplier Name: Earnscliffe Strategy Group
Contract Number: 01B68-200141/001/CY
Contract Value: $84,931.08 (including HST)
Contract Award Date: June 13, 2019
Date of Delivery: July 17, 2019

Registration Number: POR 023-19

For more information on this report, please contact Agriculture and Agri-Food Canada at: aafc.por-rop.aac@canada.ca

Ce rapport est aussi disponible en français.

Canada

2019 Consumer Perceptions of Food
Qualitative Research Report

Prepared for Agriculture and Agri-Food Canada
Supplier Name: **Earnscliffe Strategy Group**
July 2019

This public opinion research report presents the results of focus groups conducted by Earnscliffe Strategy Group on behalf of Agriculture and Agri-Food Canada. The research was conducted in June 2019.

Cette publication est aussi disponible en français sous le titre : **2019 Perceptions des consommateurs à l'égard des aliments étude qualitative - Rapport.**

Public Affairs Branch
Agriculture & Agri-food Canada
1341 Baseline Road
Ottawa, Ontario K1A 0C5

Catalogue Number: A22-629/1-2019E-PDF

International Standard Book Number (ISBN): 978-0-660-32353-4

Agriculture and Agri-Food Canada Number: 12982E

Table of Contents

Executive Summary

Earnscliffe Strategy Group (Earnscliffe) is pleased to present this report to Agriculture and Agri-Food Canada (AAFC) summarizing the results of qualitative research into consumer perceptions of food.

AAFC regularly conducts research into Canadians' perceptions of food. Working with another supplier, earlier this year, AAFC conducted the fifth quantitative study to measure changes in consumer perceptions, purchase behaviours and preferences for certain food attributes, as well as an assessment of consumer perceptions and behaviours with respects to food attributes that have received increased attention from buyers. To validate findings that arose in the quantitative study, probe further into themes, and seek reasons and clarification behind some of the responses, AAFC wanted to conduct a follow-up qualitative phase of research.

This report summarizes the findings of the qualitative phase. The findings will be used to inform and shape the 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. AAFC also wanted to gather insights on new and evolving areas of interest. The contract value for the qualitative phase was $84,931.08 including HST.

The research included a series of twelve in-person focus groups across five locations – Moncton, New Brunswick (June 24); Montreal, Quebec (June 25); Toronto, Ontario (June 25); Winnipeg, Manitoba (June 26); and, Edmonton, Alberta (June 27). These locations were selected given they represent a good cross-section of urban centres across Canada and are locations where we could find a concentration of official language minority communities (OLMCs). To satisfy this requirement, one session was conducted with French speakers outside Quebec (in Moncton); and, one session was conducted with English speakers in Quebec (in Montreal).

The audience for the groups was Canadian adults (18+) who have main or joint responsibility for grocery shopping. In each location, the focus groups began at 5:30 pm and 7:30 pm. The sessions were approximately 1.5 to 2 hours in length.

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. Because of 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.

- The overwhelming majority of participants across all regions were not all that preoccupied with concerns about the quality or safety of food available to them. Indeed, the primary drivers of food purchase behaviour were price and value for money, followed by quality (in the sense of "freshness", "taste", "texture", "tenderness"), and convenience.

- When prompted as to the attributes they look for when buying food, very few indicated that they seek anything specific although some mentioned looking for products that are local or Made in Canada, organic (for some) or foods/ingredients to avoid because of either allergies or for dietary reasons (i.e. gluten-free, low sodium, etc.).

- Interpretations of locally produced products, in all cities outside Montreal, tended to extend beyond participants' immediate cities and provinces, to include neighbouring provinces. What was most inferred about locally produced products was that they were generally of better quality (as defined above) and better for the environment as they required less travel to destination. The most important drivers to buy local tended to relate to a desire to support local producers and give back to the community.

- Some often referred to locally produced products as organic. When prompted, these participants indicated that they buy organic because they want to believe that the product is more natural and less harmful (no preservatives, hormones, pesticides, etc.), but many admitted not knowing what the term refers to and having a certain level of skepticism around the legitimacy of the label/claim.

- While there was some confusion as to what Made in Canada or Product of Canada meant, participants indicated they do intentionally purchase Canadian; mostly because they had the sense they required less travel and because there seemed to be a certain level of trust in Canadian food safety and quality especially as compared to foods from (some) other countries.

- Very few participants indicated they intentionally purchase food products that are produced either using environmentally sustainable methods or under conditions related to the humane treatment of animals.

- Perceptions of the quality and safety of Canadian food were generally quite high. Most had the sense that Canadian standards and regulations were more stringent than most other countries and felt that the Canadian system was more heavily regulated and enforced.

- In terms of labelling, participants tended to believe that the information on labels was generally correct, that manufacturers were not deliberately trying to deceive, and that the Canadian government regulated the information required on food labels. However, the fact labels are also important marketing tools was not lost on most participants.

- Although informed reactions were generally positive, no one had heard of the Food Policy for Canada or Safe Food for Canadians Regulations.

- Despite the fact that usually about half of participants in each group had heard of the updated Canada's food guide, very few indicated having changed their behaviours as a result of the new food guide.

- Participants' views of the Canadian food system, farmers and producers were overwhelmingly positive. They held especially favourable views of smaller, local, operators who were described as hard-working, tireless, proud, salt-of-the-earth type people. In contrast, those with larger farming operations were sometimes viewed as businesses, motivated primarily by economics.

- In terms of communications, most participants did not feel they would like or need to be consulted by the Government. Indeed, a number of participants questioned why they would need to hear from the Government about the quality and/or safety of their food, other than food recalls which they hear about now.

- What they would most like to know about Canada's food system relates to the lack of knowledge of the various terms mentioned earlier (i.e., organic, foods producing using environmentally sustainable methods, etc.).

- In terms of their preferred communications channels, participants felt that ads on social media (Facebook, Twitter, Instagram and YouTube), television, radio, in the mail and in grocery stores, as well as education in schools would be the most effective ways to communicate with them.

Research Firm:

Earnscliffe Strategy Group Inc. (Earnscliffe)
Contract Number: 01B68-200141/001/CY
Contract award date: June 13, 2019

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: Stephanie Constable Date: July 17, 2019

Stephanie Constable
Principal, Earnscliffe

Introduction

Earnscliffe Strategy Group (Earnscliffe) is pleased to present this report to Agriculture and Agri-Food Canada (AAFC) summarizing the results of qualitative research into consumer perceptions of food.

AAFC regularly conducts research into Canadians' perceptions of food. Working with another supplier, earlier this year, AAFC conducted the fifth quantitative study to measure changes in consumer perceptions, purchase behaviours and preferences for certain food attributes, as well as an assessment of consumer perceptions and behaviours with respects to food attributes that have received increased attention from buyers. To validate findings that arose in the quantitative study, probe further into themes, and seek reasons and clarification behind some of the responses, AAFC had a follow-up qualitative study conducted.

The specific objectives of this phase included, but were not limited to exploring:

- Canadians' preferences for food quality and market attributes (e.g. point of purchase attributes for making purchasing decisions);
- Canadians' views on production methods (e.g. local, organic, humane, environmentally sustainable production claims);
- Canadians' views on food production (e.g. biotechnology and genetic engineering);
- Drivers of Canadians' trust in the agricultural sector; and,
- Trends in Canadian information acquisition and purchasing habits.

The findings of the research will be used to inform and shape the 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.

This report summarizes the findings of the qualitative research, although findings of the quantitative research are woven throughout for reference.

With respect to the initial quantitative phase, the 2019 Survey on Consumer Perceptions of Food consisted of a sample of 3,031 Canadians (18+) who have at least half of the responsibility for grocery shopping in the household. The study was conducted by EKOS Research Associates based on a random selection of Prob*it* panel members from across the country. The survey was conducted largely online, with a very small segment completing the survey by telephone. The survey was conducted from February 13 to March 1, 2019.

Earnscliffe conducted the follow-up qualitative research which included a series of twelve in-person focus groups across five locations – Moncton, New Brunswick (June 24); Montreal, Quebec (June 25); Toronto, Ontario (June 25); Winnipeg, Manitoba (June 26); and, Edmonton, Alberta (June 27). These locations were selected given they represent a good cross-section of urban centres across Canada and are locations where it was possible to find a concentration of official language minority communities (OLMCs). To satisfy this requirement, one session was conducted with French speakers outside Quebec (in Moncton); and, one session was conducted with English speakers in Quebec (in Montreal).

The audience for the focus groups was Canadian adults (18+) who have main or joint responsibility for grocery shopping. In each location, the focus groups began at 5:30 pm and 7:30 pm. Participants were given an honorarium of $100 as a token of appreciation for their time. The sessions were approximately 1.5 to 2 hours in length.

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. Because of 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.

Detailed Findings

The detailed findings of this qualitative research are divided into four sections and follow the flow of the discussions of the focus groups. The first section explores participants' behaviour around food purchases; the second, confidence in food safety; the third public trust in the Canadian agricultural sector; and, the fourth, communications preferences.

As this qualitative research explored the findings of an earlier quantitative phase, insights from that study are included and presented in boxes throughout.

Except where specifically identified, the findings represent the combined results across region and language.

Food Purchase Behaviour

The focus groups began with a general discussion about food purchase behaviour to understand how participants make purchase decisions and to understand whether and how the quality and safety of food factors into those decisions.

The overwhelming majority of participants, across all regions, were not at all preoccupied with concerns about the quality or safety of food available to them. In fact, no one raised concern regarding food quality or safety as a key driver of their food purchases; nor did they give it any thought when going to the grocery store to buy food.

Indeed, there appeared to be three key drivers of purchase decisions: price, quality, and convenience.

The primary drivers of food purchase behaviours were, by far, price and value for money. On an unaided basis, participants spoke of budgeting, consulting flyers and coupon apps (Flipp and reebee mentioned specifically) before shopping, buying in bulk, and price matching as ways to ensure they did not overspend on groceries.

"The most important criteria driving my purchases is what's on sale. I often shop at Walmart because they do price matching." – Moncton

"I check the flyers before I head out. I'm always looking up the specials because I want the best value for money. I then plan my route to hit the different grocery stores." – Montreal

"I shop once a week and I can go to four different places but I am looking for a deal." – Toronto

Others referenced quality in terms of "freshness", "taste", "texture", and "tenderness" as an important, albeit secondary, driver of purchase behaviour. For some, quality (as defined above) trumped price particularly in the case of meat, purchased from a butcher, and/or produce purchased at local farmers' markets. Participants described having more comfort and trust in the butcher and local farmers – having developed personal relationships and a sense that these foods were better prepared, fresher, and could be customized based on needs/preferences (in the case of cuts of meat).

"I like to buy my meat at the butcher shop. The quality of meat is really good. The butcher is personable and knowledgeable. I feel it is fresher and prepared better somehow. I also like that they will customize the cuts based on my needs." – Winnipeg

The third criteria mentioned by some participants was convenience. Those who shop for convenience spoke of stopping on their way home from work or at the nearest grocery store because they do not have time to run around and just want to get in, get the food they need, and get out. More often than not, these were people who lived alone and/or those who had to grab one or two ingredients to make dinner.

"I shop at stores within walking distance of my house. I buy pre-packaged meals. I am all about convenience." – Winnipeg

"I look for grocery stores between work and home." – Edmonton

Food Purchasing Behaviour: Quantitative Findings

- In keeping with focus group results, best value for money is the trait most survey respondents seek always/often when purchasing food (84%). This is followed by nutritional value (76%), which was not raised spontaneously in the focus groups, although participants did mention consulting product labels for ingredients lists and nutritional information.
- While not the most important criteria, Made in Canada is a key factor for 69% of respondents and locally produced is a factor for 63% of respondents, which in the focus groups were surrogates for identifying quality, "fresh" products.
- Finally, convenience, which emerged as an influence on purchasing decisions in the focus groups, is something 49% of respondents often/always consider.

When asked whether they consult the packaging or food labels to help decide whether or not to purchase a certain food product, most participants said they tend to consult the ingredients list and nutritional value of a product. In fact, in terms of specific attributes they look for when making food purchases, very few indicated that they seek anything specific other than: local or Made in Canada; organic (for some); and/or, ingredients that they or a family member needs to be aware of for allergy and/or dietary reasons (i.e. gluten-free, low sodium, etc.).

Interpretations of locally produced products, in all cities outside Montreal, tended to extend beyond their immediate cities and provinces to include neighbouring provinces. For example, in Moncton, locally produced referred to foods from any and all Atlantic provinces (e.g. PEI potatoes). In Toronto, Winnipeg and Edmonton, it referred to foods made in their respective provinces but also Alberta beef (for those in Toronto and Winnipeg) and British Columbia fruits (for those in Edmonton). In Montreal, however, locally produced referred specifically to products produced in the province of Quebec. Products outside of Quebec were referred to as Canadian products and were not seen as local.

What most participants inferred about locally produced products was that they were generally of better quality (as defined above) and better for the environment, as they required less travel to destination. The most important driver to buy local, however, tended to relate to a desire to support local producers and to keep money in the community.

Purchasing Local Food: Quantitative Findings

- Local food was one attribute that survey respondents reported seeking out, and 62% of respondents also said that they always or often purchase these products.
  - In both the quantitative and qualitative research, supporting the local economy and a smaller perceived impact on the environment were viewed as good reasons to buy local (91% and 42% respectively in the survey). The quantitative research also outlined other drivers, such as freshness (67%).

Some participants referred to locally produced products as organic. When prompted, these participants indicated that they buy organic because they want to believe that the product is more natural and less harmful (no preservatives, hormones, pesticides, etc.), but many admitted not knowing the meaning of the term organic. Some were skeptical of the legitimacy of the claim and recounted having heard contradictory and confusing stories (e.g., that inspections for certification only occur annually, which opens the door for unethical behaviour; the possibility of cross-contamination of chemicals and/or pesticides across neighbouring fields/crops, etc.). Many also felt that labelling something as organic was a marketing ploy to enable producers and retailers to charge more.

"I'm not so sure about organic. What about the organic field that is right beside a field that uses pesticides? How do you know they haven't been cross-contaminated?" – Moncton

"Sometimes I buy organic. Psychologically, I feel I'm doing something better." – Winnipeg

"I don't know if it's real or a misconception. What I do know is that it is always more expensive." – Edmonto*n*

Some participants also indicated that they intentionally purchase products that claim to be Made in Canada or Product of Canada, which they said are identifiable by the maple leaf.

More often than not, purchasing products that claim to be Made in Canada or Products of Canada related to a desire to support "our own", especially for economic reasons. Participants also liked to think that these products required less travel (which was good for the environment). Finally, many also looked for these products because they felt there was a certain level of trust in Canadian food safety and quality, with apprehension expressed about these aspects as related to foods from other countries.

*"*It means it's more fresh; less travelled." – Winnipeg

"It means it's from people with the same values." – Winnipeg

In terms of what participants interpreted from this branding, the discussions demonstrated that there was a lot of confusion. First and foremost, most inferred that any product that claims to be Made in Canada or a Product of Canada is 100% Canadian. In fact, some complained that labelling a product that was not 100% Canadian as Made in Canada or Product of Canada was misleading.

"I assume when I see Made in Canada that it's 100% Canadian." – Montreal

However, when pressed, some felt that Made in Canada could infer that a product was "made" in Canada, with the implication that a process was involved (including processing of ingredients that originated elsewhere). Similarly, participants seemed to be more comfortable with the branding Product of Canada for products that contained elements that did not originate in Canada or were only processed in Canada. However, this was not universal. Some interpreted Product of Canada as being something 100% Canadian as they reasoned the term "product" implied everything originated in Canada. Alternatively, a comment was raised that although sugar in ketchup may not be from Canada, if the tomatoes were from Ontario, it is usually considered a product of Canada.

Upon reflection, some participants questioned whether this branding was a marketing ploy used to make consumers think a product is Canadian, and therefore better.

"Personally, I'm hoping I can trust the Made in Canada or Product of Canada label and that that means our products are made better." – Edmonton

Very few participants indicated that they intentionally purchase food products that claim to be produced either using environmentally sustainable methods or under conditions related to the humane treatment of animals.

Food Purchasing Behaviour - Key Product Attributes: Quantitative Findings

- While over a third of survey respondents say they always or often look for food items that indicate they are humanely produced (39%) or produced in an environmentally sustainable way (38%), few participants in the focus groups indicated that either is a factor.

While views on environmentally sustainable methods and humane treatment of animals are discussed in detail below, it is worth noting that in the context of their key purchase drivers, for those participants who try to purchase these kinds of products, cost often trumps these criteria when there is a significant price difference.

"If they have free range eggs and cost is comparable, I will buy free range. If the cost is not comparable, I will buy the regular eggs." – Winnipeg

Where foods that claim to be produced using environmentally sustainable methods were concerned, many participants were confused by the term. In fact, in most groups, participants initially assumed it referred to a desire to limit product packaging. When prompted, participants generally linked it to less travel required to transport products and a few guessed that it may refer to environmental impacts linked to water usage and/or soil usage/quality.

"For me, environmentally sustainable means it will be around in five years. I'm not sure what this means in the context of food." – Toronto

"I'm not sure what it means. I have heard of it in the case of fisheries." – Toronto

In terms of labelling, the majority of participants did not think products that claim to be produced using environmentally sustainable methods were easy to identify; although, other than buying local or Canadian, they did not see it as an important motivator of purchase behaviour. It certainly did not come up unprompted as a key driver for purchasing.

"I want to be environmentally-friendly. I try to buy in bulk and limit packaging." – Moncton

"I wouldn't even know what to look for even if I wanted to buy environmentally produced products." – Winnipeg

Not surprisingly, those who indicated intentionally purchasing products that claim to be produced under conditions related to the humane treatment of animals were often those who identified as vegan or vegetarian. They often spoke of having seen documentaries or videos showing production practices that demonstrated inhumane treatment of animals that impacted their food preferences.

Most other participants were not confident as to what practices this would encompass. For example, they assumed it referred to claims that animals were to be raised hormone and/or antibiotic free. However, they questioned what humane refers to with respect to how animals are raised and slaughtered.

In terms of labelling and what participants look for specifically when buying food produced using environmentally sustainable methods and humane treatment of animals, they generally pointed to one example: eggs labelled as "free range". One or two participants mentioned looking for a bunny symbol on products that they felt identified products that were animal cruelty free. The consensus, however, was that it was not easy to identify products that claim to be produced in these ways other than consulting the ingredients list or a list of brands (companies) that a few participants had developed to identify companies not living up to their personal ethical standards.

"It's kind of funny. They say antibiotic and hormone free but I question what's humane?" – Moncton

Confidence in Food Safety

Discussions investigated participants' confidence in the quality and safety of Canadian foods, especially as compared to the foods produced in other countries and imported into Canada. The discussions also explored participants' views on product labelling as well as awareness and impressions of recently announced government policies and regulations.

The overwhelming majority of participants, across all regions, were generally very trusting of the Canadian food system overall. Indeed, the majority indicated that they were not preoccupied with the quality and safety of food available to them in grocery stores. This trust was also derived from the fact that participants were aware and had heard about food recalls in the past. Based on this experience, participants understood that mistakes happen from time to time, that they are alerted swiftly by the Government, and they trust that these mistakes get fixed.

Confidence in the Food Safety System: Quantitative Findings

- The results of the survey generally demonstrate Canadians trust the food safety system when it comes to a number of key attributes, though not as broadly as the focus groups might suggest when it comes to a few issues.
- While these concerns were not raised in the focus group discussions, the highest proportion (74%) of respondents expressed confidence in the system when it comes to animal diseases such as Mad Cow Disease or Avian Influenza, followed by bacterial contamination (66%). They are less confident in the system's handling of food additives and preservatives (45%) and GMOs (46%).

Perceptions of the quality and safety of food produced in Canada were generally quite high. Most had the sense that Canadian standards and regulations were more stringent than most other countries. Furthermore, participants felt that we have a transparent system that is heavily regulated and enforced. Participants spoke of a belief that Canada has the necessary infrastructure in place to ensure the quality and safety of our food. They also assumed the government plays a role in establishing and enforcing regulations.

"Our standards are definitely better than elsewhere. Our producers are much more aware of norms and regulations." – Montreal

"Products from Canada are good. I would never doubt the safety of our products." – Toronto

"We have more money here, more transparency here. Someone is looking out for me." – Edmonton

As compared to other countries, participants felt Canada has a much better reputation for food quality and safety. For example, many volunteered feeling less trusting of foods from the United States, mostly due to the current political context, and Asian countries (China often mentioned specifically).

"I have far fewer questions about the quality and security of Canadian products, than the US, for example." – Montreal

"I would never buy anything from China. They use whiteners." – Toronto

While there was some uncertainty about the specific machinations and how it was executed, participants also generally believed products imported into Canada are well scrutinized. Most were aware of there being an inspection process and standards to which products entering the country are accountable. However, some had heard that there was currently a shortage of inspectors in Canada which raised questions about the extent to which products are inspected and the potential ramifications of this on the quality and security of Canadian food.

"We've had incidents with our beef. I think we handled it well. Governments care. They're not always perfect but they have the right systems in place." – Edmonton

"I believe the Canadian government has a certain level of integrity even on imports. They ensure we meet certain standards." – Edmonto*n*

Product Labelling

As mentioned earlier, in terms of product labels, most participants consult the labels for nutritional facts and ingredients. Very few consult the labels for any other information, especially when making purchase decisions.

Generally, participants tended to believe that the information on labels is correct, that manufacturers are not deliberately trying to deceive, and that the Canadian government regulated the information required on food labels.

"Maybe I'm naïve but I have confidence in Canadian labelling and that they have the best of intentions." – Moncton

However, the fact labels were also important marketing tools was not lost on most participants. Participants acknowledged that manufacturers include different types of information on labels such as: brands, graphics, colours, language, etc. that are meant to appeal to consumers. Where some participants felt that some aspects of labelling might be a little misleading seemed to manifest itself in three ways.

First, as mentioned earlier, there was a certain level of pessimism around the labelling of products as organic, non-GMO, free range, etc. as these terms were felt to be vague and not commonly understood. It was not uncommon to hear participants suggest that labelling something as organic, for example, was a marketing tactic to charge more for a product.

Second, some wondered whether manufacturers try to conceal that a product contains certain ingredients and/or present misleading nutritional information. Sugar was the most frequently raised example of misrepresenting ingredients because it was often referred to it by different names that may not be universally understood, such as: fructose, sucrose, (different) syrups, etc. Listing nutritional values based on one serving when a box contains three servings was presented as an example of misleading nutritional values.

Third, there were some questions around the inclusion of other branding on labels; the Heart and Stroke Foundation was cited specifically. Participants questioned what inclusion of such brands implies, especially in cases where the certification appeared on products they questioned (for health reasons), and wondered about the legitimacy and motivations of the appearance of these brands on food labels.

"Some certifications have gotten screwed up. The Heart and Stroke Foundation certification, for example. What does that label even mean?" – Moncton

Confidence in Food Labelling: Quantitative Findings

- Reflecting results from the focus groups, the quantitative study found that respondents are more confident about some aspects of labelling than others.
- About half (52%) have confidence in nutrition facts, as did most focus group participants. However, survey respondents are less certain about organic food labelling (28%) and GMO-free labels (23%), reflecting concerns in the focus groups that such labelling is often vague or misunderstood.

Ultimately, participants felt there needs to be more public education around food labelling, terminology, and production practices, etc. Others suggested including more information on the labels although a number of participants questioned whether they would take the time to read the labels in any more depth than they do now; bear in mind the importance participants' placed on convenience and efficiency when food shopping.

The exception worth noting was those who shop for people with allergies or special dietary restrictions. These participants conveyed a real desire for greater standardization of labelling information. The most significant challenge raised tended to relate to the difficulty discerning important information from one product to another. They argued the merits of having one quick, efficient, and common way of identifying what they needed to know.

"It takes me forever to figure out if a product is gluten-free or not. There needs to be more consistency in labelling practices." – Edmonton

Awareness and Views on Recent Government Policies

To wrap up the discussion on confidence in food safety, participants were asked whether they were aware of or had seen, heard or read anything about the updated Canada's food guide, the new Safe Food for Canadians Regulations and the Food Policy for Canada. Awareness of the updated Canada's food guide was higher than the new Safe Food for Canadians Regulations and the Food Policy for Canada.

In each group, usually about half of participants had heard of the updated Canada's food guide although their knowledge of the changes was limited. In general, participants suggested that they do not usually follow the food guide to the letter and many felt the updated Canada's food guide was essentially an update to be more in-line with current thinking on healthy eating.

When asked, participants described having heard that the updated Canada's food guide: emphasized consumption of fruits/vegetables, reliance on water, less dairy (including milk for drinking), and less meat (with a recommendation to derive protein from other plant-based sources).

Irrespective of their awareness and limited knowledge, very few participants indicated having changed their behaviours as a result of the updated Canada's food guide. Again, some participants explained they did not follow the previous food guide. Others explained they were skeptical of the corporate influence (political lobbies) on the guidelines.

Awareness and Impressions of the Updated Canada's Food Guide: Quantitative Findings

- Echoing focus group results, more survey respondents were aware of the updated Canada's food guide (76%) than other Government of Canada initiatives.
- Two-thirds (65%) of respondents did not feel it would impact their purchasing decisions. This finding is in line with the qualitative research – few participants said the updated guide has influenced their behaviour.

Of the few who had made an effort to change their eating habits as a result of the updated Canada's food guide, they pointed to having changed the proportions they consumed, made an effort to eat more vegetables, and introduced more balance (diversity of foods) in their meals.

"They caught up to things we were already doing." – Montreal

"Water should be the drink of choice. We're trying to drink less milk." – Winnipeg

In terms of the new Safe Food for Canadians Regulations and the Food Policy for Canada, there was no unaided awareness of either policy; indeed, no one in any focus group was aware of either.

Awareness and Impressions of Government Policies: Quantitative Findings

- Respondents to the quantitative survey reported higher levels of familiarity with Government of Canada initiatives than focus group participants, which is not all that surprising when conducting online surveys
  - One-quarter had heard of the Food Policy for Canada, while one in five had heard of the Safe Food for Canadians Regulations.
- The majority of respondents (55%), presented with a description of the Safe Food for Canadians Regulations, viewed them positively, as did most focus group participants.

Participants were then read the following brief description of the Safe Food for Canadians Regulations:

> The Safe Food for Canadians Regulations aim to make the Canadian food system safer by focusing on prevention and allowing for faster removal of unsafe food from the marketplace. The regulations also require imported food to be prepared with the same level of food safety controls as food prepared in Canada.

Based on this description, participants' reactions were generally positive although some questioned whether these were new regulations as most were under the impression these measures were already in place. Indeed, the overwhelming majority hoped that this described the current (and desired) process by which they thought the

Canadian food system was regulated. As presented, the suggestion that this was a new regulation and therefore not the regulations currently in place did raise some questions for participants.

Participants indicated that the definition sounded too broad and too much like government jargon for them to understand exactly what would be done to safeguard food. Upon reflection, some did question the government's ability to execute on this regulation especially as it relates to inspections of food imports (e.g. whether Canada has enough inspectors, how can Canada inspect food processes on foreign soil, whether all of the foods imported into Canada are inspected, etc.). As will be seen later in the Communications section of this report, more information about inspections was certainly an area of interest for a number of participants.

"This is awesome! Assuming they're followed, this makes me feel more confident." – Moncton

"This means nothing to me. There are not enough inspectors to do this. How will they be able to accomplish this?" – Montreal

Similarly, based on the lack of awareness of the Food Policy for Canada, participants in Winnipeg and Edmonton were read the following brief description:

> The Food Policy for Canada is a federal government approach launched on June 17, 2019 to address food related challenges in Canada, including social, health, environmental and economic issues.
>
> It is a $134.4 million investment over five years focussed on four key action areas:
>
> - Helping Canadian communities access healthy food;
> - Making Canadian food the top choice at home and abroad;
> - Supporting food security in Northern and Indigenous communities; and,
> - Reducing food waste.
>
> To learn what Canadians wanted and needed in their food system, Agriculture and Agri-food Canada held public consultations throughout 2017. More than 45,000 Canadians and stakeholders shared their ideas. Their feedback was carefully considered in the development of the Food Policy for Canada.

Reactions to the Food Policy for Canada as described above were overwhelmingly positive. Participants were especially pleased to hear that there were deliberate intentions to address the needs of those living in Northern communities; and, to a lesser extent, that there was a plan to reduce food waste. The only concern or hesitation participants raised was related to the cost of such a policy and whether there would be enough funds to meet all its objectives. Some worried that these costs would somehow be transferred to Canadian taxpayers.

"This sounds great but my question is about costs. For this to happen, costs are going to have to be pushed down to municipalities." – Winnipeg

"This only works when it's affordable. We can't meet demand here. We don't have the capability given our climates." – Winnipeg

"I feel really sorry for Indigenous people. In terms of need, this is the biggest priority. It is a basic human right to have food." – Edmonton

"I am more likely to shop at a grocery store that is more responsible and conscious of food waste. We could feed the homeless with the food the grocery store wastes; it is perfectly good food." – Edmonton

Also worth noting, a number of participants expressed interest in receiving follow-up information over time. They felt it would be important to report on the progress and outcomes of this policy.

Public Trust

The discussion around the quality and safety of Canadian foods led to a discussion about public trust in the Canadian food system.

As mentioned earlier, the majority of participants tended to think the agricultural sector is responding to consumer preferences to the best of their abilities, although most appreciated there are some significant pressures facing the sector today. Participants pointed to the increasing demand (more mouths to feed) in a fast-paced, ever-changing sector that is facing significant weather and climactic challenges. Participants appreciated that this is no small feat. Coupled with the fact that very few, if any, participants questioned or worried about the foods available to them also speaks to an overall trust in the Canadian food system and agricultural sector.

"We put our faith in the people doing their jobs." – Moncton

"The agricultural sector is limited. There is only so much we can do here with the changing weather, our seasons, etc." – Edmonton

Views of farmers and producers were also overwhelmingly positive, particularly of smaller, local, operations. Local farmers and producers were described as hard-working, tireless, proud, salt-of-the-earth people.

"I trust farmers are telling the truth. I have a nice picture in my head of lush fields, things growing, etc. It's their business. They have pride in their work." – Moncton

"Would you get up at 5 am every day, never go on vacation? It is back-breaking, thankless work." – Moncton

"They are genuine people. They really do care. They enjoy their jobs. This is their livelihood." – Edmonton

In contrast, those with larger farming operations were often viewed more as businesses than people; motivated primarily by economics. Interestingly, in most groups, one or two participants raised initial apprehensions about the motivations of larger producers; however, in each group there was always one or two participants who were quick to point out that the reputations of larger operations rest equally on the quality and safety of their products. They also argued that given their size, larger operations often had the funds to ensure the necessary infrastructure was in place to ensure the quality and safety of their products.

"The bigger companies are more reliant on checks and balances. They learn their lessons the hard way and are motivated to do better." – Edmonton

Worth noting, in Moncton, more than any other city, participants ascribed responsibility to grocery stores to ensure the quality of food available in their stores. In fact, although mentioned by a few participants in other cities, participants in Moncton spoke most strongly of holding the grocery store accountable for ensuring the quality of food in their stores.

"Because I buy in grocery stores, it is their responsibility to buy local, get the products at a decent price, and ensure the quality and safety of the products available in their store." – Moncton

"I trust my grocer to be checking all these things. It's a large reputable company. They are liable." – Moncton

Communications

The discussions wrapped up with an exploration around communications preferences and needs.

Most participants did not feel they would like to or need to be consulted by the Government. Indeed, a number of participants questioned why they would need to hear from the Government about the quality and/or safety of their food, other than food recalls which they tend to hear about now; although, there was a desire for better communication about when a recall is over. This speaks to the comfort they spoke about with respect to the quality and safety of the Canadian food system; the fact they do not question either in terms of the food available to them; and, that they have not had a troubling incident in the past. Some also spoke of preferring to live in a state of ignorance, arguing that they like to eat too much to feel bad about what they are eating; this was especially the case with respect to eating meat.

"I have never had an issue. At the end of the day, we all have to eat." – Moncton

"I am not all that interested in more information. It's like opening up Pandora's Box. Ignorance is bliss." – Montreal

Those who would like to know more about Canada's food system made a number of suggestions. First and foremost, as mentioned earlier, participants would very much like to better understand the meaning of the various terms discussed throughout the groups such as: organic, foods produced using environmentally sustainable methods, humane animal welfare practices (i.e., free range), etc. Other suggestions participants made for information desires included:

- The evolution of a product (chain of custody) including where it was grown, how and where it was processed, where it was inspected, how far it travelled, etc.;
- Comparative data on the quality and safety of foods produced in other countries;
- Where inspections are conducted (whether on foreign soil or upon entry), how inspections are conducted (i.e., percentage of products inspected), etc.;
- Information on relevant infractions outside of Canada;
- How labels should be interpreted based on the public education around the various terms in the food system (as referenced above);
- Accountability and role of different players involved in the Canadian food system such as farmers/producers, production facilities, government, merchants, etc.;
- How the Canadian government supports farmers and producers; and,
- Regulations around different farming/production practices (i.e. use of GMOs, pesticides, hormones, antibiotics, etc.).

"More transparency. Where it started and how it got to where it is now." – Moncton

"I would like to understand the steps involved; how things are made?" – Montreal

Participants were not surprised to learn that a lot of the aforementioned information was likely available on the Government of Canada website. And, while they believe it is important for the Government to make this type of information available on their website, this was not the preferred mode of communication for most. Based on past experience, the majority of participants felt that navigating the Government of Canada website was challenging and frustrating.

"I would like to see more transparency. Information needs to be accessible." – Montreal

In terms of their preferred communications channels, participants felt that ads on social media (Facebook, Twitter, Instagram and YouTube), television, radio, in the mail and in grocery stores, as well as education in schools would be the most effective ways to communicate with them. With respect to YouTube, specifically, participants, especially men, felt it would be effective to play a Government ad that directs viewers to a website (bearing in mind the aforementioned views of Government websites) before popular programming.

While not the majority view, another suggestion raised in a number of cities was to include features on investigative shows like CBC's Marketplace and Découverte as well as features on food shows and/or partnering with food bloggers. The idea of having celebrity chefs promote information on their cooking shows was also raised. These were sources participants volunteered they consult and trust; they felt this would be an interesting way to communicate about Canadian foods and the Canadian food system.

Communications: Quantitative Findings

- As participants voiced in the focus groups, survey results show social media is among the most effective ways to reach Canadians (32%), followed closely by Government of Canada websites (31%), which were suggested less frequently in the groups.

As part of the discussion, we introduced a number of specific communications ideas including: provision of a list of companies who acted negligibly; live streaming of farming operations and/or production facilities; and, availability of information via Quick Response (QR) codes.

In terms of this list of specific ideas, participants thought that a list of companies who had acted negligibly, would be of interest; although, some wondered whether the list might be unnecessarily inflammatory (i.e., reporting companies who had infractions that were beyond their control and not related to the safety/quality of the foods they produced). To this point, participants felt that the list should refer to the specific infraction and the outcome (i.e., if and when it was corrected).

"I think a list could be interesting but it could go both ways. I can imagine a scenario where they were reported for something that they had no control over like a water leak in their plant." – Moncton

"I like that idea. It's like the restaurants list. They should also include the reason and the approach taken to correct the issues. There has to be follow up to the list." – Montreal

Reactions to the suggestion of live streaming of farmers and/or food processing facilities was interesting to some and participants did mention having watched documentaries about farming operations in the past, especially those related to the inhumane treatment of animals. However, many questioned whether they would watch a live stream and thought videos and/or whether documentaries would be watched more readily. Again, as mentioned earlier, many participants prefer not to know too much about food production because they do not want to feel guilty about eating the foods they really like.

"I don't want to think about it." – Edmonton

Reactions to QR codes was neutral to negative. Some questioned the popularity/use of this form of communication. No one felt that it would be something they would do while grocery shopping; complaining that it would be far too time-consuming.

"I am not really confident on how to use those [QR codes]. Do I need an app?" – Winnip*eg*

Conclusions

Overall, participants were not concerned with the quality or safety of food available to them. Neither are drivers of their food purchases, likely in part because they have never experienced anything major relating to food consumption and because of a perception that the Canadian food system is well regulated. Instead, the primary drivers of food purchase decisions were price and value for money, with participants taking steps such as budgeting, checking flyers, price-buying in bulk and price-matching to ensure they do not overspend. Secondary to price/value was quality, meaning “taste”, “texture”, and “tenderness” (not necessarily “safety”). For some, quality (as defined above) trumped price particularly in the case of meat, purchased from a butcher or specialty shop, and/or produce purchased at local farmers markets. Convenience was an important consideration for some.

Few seek any specific attributes when shopping for food, aside from local or Made in Canada or organic (for some) which were surrogates for quality and/or, ingredients that they or a family member needs to be aware of for allergy and/or dietary reasons (i.e. gluten-free, low sodium, etc.).

The most important driver to buy local foods tended to relate to a desire to support local producers and give back to the community; and because locally produced products generally inferred better quality products (as defined above) and better for the environment as it is required less travel to its destination. Some participants referred to locally produced products as organic. These people were more likely to buy such products because they want to consume food that is more natural and less harmful (no preservatives, hormones, pesticides, etc.), but many admitted not knowing what the term refers to. Some were skeptical of the legitimacy of the claim and/or felt it could be a marketing ploy to enable producers and retailers to charge more.

Participants also indicated they intentionally purchase products Made in Canada or Product of Canada. Again, they felt that these products required less travel, which was good for the environment and resulted in fresher food. However, many also seemed to place greater trust in Canadian food safety and quality. In terms of this branding, the focus groups suggested that there was a certain level of confusion around the interpretations of the Made in Canada, Product of Canada and Processed in Canada branding. For some, Made in Canada and Product of Canada inferred that a product was 100% Canadian and there was a sense that labelling a product that was not 100% Canadian in these ways would be misleading. For products that are processed in Canada, the Processed in Canada label was much more clear and understood.

Very few participants indicated that they intentionally purchase food products which claim to be produced either using environmentally sustainable methods or under conditions related to the humane treatment of animals. Most felt it was not all that easy to identify products that meet these descriptions.

Most participants trusted that Canadian food was safe and of high quality, based on the assumption that Canadian standards and regulations were more stringent than most other countries and that the Canadian system is more heavily regulated and enforced. Most had the sense that the Government of Canada also regulates labelling and tended to believe the information on labels was correct although most acknowledged that the meaning of some terms was unclear and that an important dimension of labels was for marketing purposes.

Farmers, particularly smaller operations, and their products were viewed positively. Farmers were perceived to be extremely hard working and proud. In contrast, those with larger farming operations were sometimes viewed as businesses, motivated primarily by economics. However, some participants in each group were quick to point out that the reputations of larger operations rest on the quality and safety of their products and that given their size, they had the funds and infrastructure in place to ensure the quality and safety of their products.

No one had heard of the Food Policy for Canada or the Safe Food for Canadians Regulations. However, participants reacted positively to both and were glad to hear that the policy aims to address the needs of those in the North, and to a lesser degree the issue around food waste. Participants' initial reactions to the Safe Food for Canadians Regulations were generally positive, though they questioned whether these were new regulations, as most were under the impression (or hoped) these measures were already in place.

Awareness of the updated Canada's food guide was higher across all locations, although, most participants indicated they had not changed their purchasing habits as a result. Indeed, many volunteered that they did not really follow the previous food guide all that closely either.

Few participants felt they needed to be consulted by the Government, largely due to the impression that generally everything is satisfactory and they have not had an incident. What they most wanted to know about Canada's food system relates to the lack of knowledge of the various terms mentioned earlier (i.e., organic, GMO, foods producing using environmentally sustainable methods, etc.). Participants thought that a list of companies who had acted negligibly, would be of interest; although, some wondered whether the list could be unnecessarily inflammatory. They thought live streaming of farmers and production facility practices could be of interest, but thought videos and/or documentaries would be watched more readily. Social media (Facebook, Twitter, Instagram and YouTube), on television, radio, information in the mail and in grocery stores, as well as education in schools would be the most effective ways to communicate with participants about these topics.

Appendix A: Discussion Guide

Introduction 10 minutes

Moderator introduces herself/himself and her/his role: role of moderator is to ask questions, make sure everyone has a chance to express themselves, keep track of the time, be objective/no special interest.

- Moderator works for Earnscliffe Strategy Group, an independent marketing research firm
- Role of participants: speak openly and frankly when expressing opinions, remember that there are no right or wrong answers and no need to agree with each other
- Participants do not have to direct all comments to the moderator; they can exchange ideas with each other.
- Results are confidential and reported all together/individuals are not identified/participation is voluntary
- The length of the session (2 hours)
- The presence of any observers, their role and purpose, and the means of observation (presence in room; colleagues listening in remotely)
- The presence and purpose of any recording being made of the session (audio and video taping of the discussion, web streaming, etc.)
- Turn off cell phones for the duration of the discussion
- As mentioned when we invited you to participate in this discussion group, we are conducting focus groups on behalf of the Government of Canada to explore views regarding programs and services and to help inform public policy.

Moderator will go around the table and ask participants to introduce themselves.

- Introduction of participants**:** To get started, please give your first name, who lives in your household [i.e., whether you live with someone including children (number and ages of children)], and the role you play in grocery shopping and meal preparation in your household.

Food Purchasing Behaviour 30 minutes

As you know, the groups today/tonight are being conducted on behalf of the Government of Canada; the department of Agriculture and Agri-food Canada (AAFC), more specifically. The government is interested in your views on a variety of topics related to how you make decisions about the foods you purchase and eat in your household, as well as about confidence in the safety of the food you purchase.

To begin, I would like to spend some time understanding your food purchasing behaviour. This can relate to when grocery shopping or when dining away from home.

- Where do you generally shop for food? Why? Probe: grocery store, online, farmer's market.
  - Do you tend to shop for all of your groceries in one location or do you shop for different categories of food (i.e. produce, meat, etc.) at different locations? Why?
- Whether you are grocery shopping or dining out, what criteria do you use to make decisions about what you're going to buy? Why?
  - What information, specifically, do you consult? Why?
  - What are you looking for? Why?
  - Is it different depending on the category of food? Why?

- [Hands up] Do you look at the packaging?
  - When you're looking at the packaging and/or labels, what information are you looking at/for?
  - What helps you decide whether or not to purchase a certain food product? Why?
- What attributes do you consider when making food purchase decisions? Why?
  - Probe: (Moderator not to spend too much time on this area)
    - Locally produced
    - Product of Canada or Made in Canada as part of the label
    - Country of origin
    - Certification label
    - Best value for money spent
    - Nutritional value
    - Convenience
    - Health claims (including non-allergy concerns such as gluten-free)
    - List of ingredients
    - Vegetarian or vegan
    - Environmentally sustainable production
    - Organic production
    - Humane animal treatment
    - Fair trade
    - Hormone or antibiotic free (meat products only)
    - GMO (genetically modified organism)

I would like to spend some time looking at a few of these more specifically. [Moderator to rotate the order of the following]

- [Hands up] How many of you intentionally purchase locally produced products?
- To the best of your knowledge, what does locally produced products refer to?
- In what circumstances do you purchase locally produced products? Why?
- How do you determine whether a particular product is locally produced or not?
- What do you think are the most important benefits of locally produced food? Why do you say that?
- [For those who do not buy locally produced] What are your main reasons for not purchasing local food products? Why?

- [Hands up] How many of you intentionally purchase Product of Canada or Made in Canada food products? Why/why not?
- How do you determine whether a particular product is Product of Canada or Made in Canada?
  - Probe: label states "Product of Canada or Made in Canada", Canadian flag on the packaging, assumption based on purchasing at local market
- When you see Product of Canada or Made in Canada, what are your assumptions of what that label means? [Note to facilitator – for example: it's 100% Canadian, it was processed in Canada, part of the contents are from Canada, it's safe, it's certified by the Government of Canada…]

- [Hands up] How many of you intentionally purchase foods produced using environmentally sustainable methods?
- To the best of your knowledge, what does food produced using environmentally sustainable methods refer to?
- In what circumstances do you purchase foods produced using environmentally sustainable methods? Why?
- How do you determine whether a particular product is produced using environmentally sustainable methods?
- What do you think are the most important benefits of foods produced using environmentally sustainable methods? Why do you say that?
- [For those who do not buy environmentally sustainable methods] What are your main reasons for not purchasing foods produced using environmentally sustainable methods? Why?

- [Hands up] How many of you intentionally purchase foods produced under conditions related to the humane treatment of animals?
- To the best of your knowledge, what does food produced under conditions related to the humane treatment of animals refer to?
- In what circumstances do you purchase foods produced under conditions related to the humane treatment of animals? Why?
- How do you determine whether a particular product is produced under conditions related to the humane treatment of animals?
- What do you think are the most important benefits of foods produced under conditions related to the humane treatment of animals? Why do you say that?
- [For those who do not buy foods produced under conditions related to the humane treatment of animals] What are your main reasons for that, and why?

[If time permits]

- [Hands up] How many of you intentionally purchase organically produced products?
- To the best of your knowledge, what does organically produced products refer to?
- In what circumstances do you purchase organically produced products? Why?
- How do you determine whether a particular product is "organic" or not?
- What do you think are the most important benefits of organic food? Why do you say that?
- [For those who do not buy organic] What are your main reasons for not purchasing organic products? Why?

Confidence in Food Safety — 30 minutes

Now, I would like to spend some time talking about your confidence in Canadian foods.

- What is your overall impression of the quality of food produced in Canada? Why do you say that?
- How do foods imported from other countries compare in terms of quality? Why do you say that?
- How safe do you think food produced in Canada is? Why do you say that?
- How safe do you think food produced in other countries and imported into Canada is? Probe: safer, just as safe, less safe than food produced in Canada? Why do you say that?
- Do you think food imported into Canada follows the same guidelines as food produced in Canada? Probe: Do you think guidelines are more stringent, about the same, or more lax for food that comes from other countries? Why do you say that?
- How confident are you in the Canadian food system overall?
- How confident are you regarding regulations and their oversight for:
  - Probe:

- Food additives and preservatives
    - Animal diseases (i.e. Mad Cow Disease or Avian Influenza)
    - Bacterial contamination (i.e. E. coli and salmonella)
    - GMOs
    - Hormones, antibiotics and chemicals in plants and animals
  - Why do you feel this way?
- Do you have any concerns regarding food labeling? What are your main concerns? Why do you say that?
  - [Hands up] Are you confident that food products sold in grocery stores are accurately labelled for: Probe:
    - Locally produced
    - Environmentally sustainable
    - Humane animal welfare practices
    - Hormone or antibiotic free
    - Genetically modified
    - Country of origin
    - Product of Canada or Made in Canada
  - Why or why not? [Moderator to focus on why]
  - What could be done to increase your confidence in labelling?
  - Where do you get your information around food safety? What medium of information would catch your attention?

- When you see a certification label on a food product, what is your understanding of what that means? Do you trust the safety and/or quality of a product more when it has a certification? Why or why not?
  - What is your level of trust is a certification is granted by (low, neutral, high):
    - Producer groups / associations
    - Food processor association
    - Retailer (i.e. President's Choice blue label menu, free from)
    - Health care association (i.e. Heart and Stroke Foundation)
    - Independent third party organization
    - The Canadian Government
    - International organization
  - Why?

- If you thought there was a problem with your food, what would you do about it?
  - Who do you expect to give you more information about the product?
  - Who would you contact?

- Have you ever avoided or boycotted a particular food product because you were concerned about the safety of the food? In what circumstances? Why?
- What did you do instead? Did you seek an alternative product?

- Are you aware of the updated Canada's food guide? Have you changed any of your purchasing habits based on the new guidelines? Which ones and why/why not?
  - Probe why if response around eating less meat – health/environment/animal welfare?

- [Hands up] Have you seen, heard or read anything about the new Safe Food for Canadians Regulations, which came into effect on January 15, 2019?
  - To the best of your knowledge what is the aim of the Safe Food for Canadians Regulations?

So that we are all on the same page, the Safe Food for Canadians Regulations aim to make the Canadian food system safer by focusing on prevention and allowing for faster removal of unsafe food from the marketplace. The regulations also require imported food to be prepared with the same level of food safety controls as food prepared in Canada.

- Based on this description, what is your overall impression of these regulations? Why do you say that?
- Do these regulations give you more confidence in the safety of Canada's food system? Why or why not?

[In Winnipeg and Edmonton, if participants asked how this differs from current practice, read]: The Safe Food for Canadians Regulations consolidated fourteen previous regulations in one spot rather than replaced regulations.

- [Hands up] Have you seen, heard or read anything about a Food Policy for Canada?
  - To the best of your knowledge, what does this policy include or involve?

[In Winnipeg and Edmonton, read]:
The food policy is a federal government approach launched on June 17, 2019 to address food related challenges in Canada, including social, health, environmental and economic issues.

It is a $134.4 million investment over five years focussed on four key action areas:

- Helping Canadian communities access healthy food;
- Making Canadian food the top choice at home and abroad;
- Supporting food security in Northern and Indigenous communities; and,
- Reducing food waste.

To learn what Canadians wanted and needed in their food system, Agriculture and Agri-Food Canada held public consultations throughout 2017. More than 45,000 Canadians and stakeholders shared their ideas. Their feedback was carefully considered in the development of the Food Policy for Canada.

- Based on this description, what is your overall impression of the food policy? Why do you say that?

Public Trust 30 minutes

Now, I would like to spend some time talking about your confidence in Canadian foods.

- What or who has been the biggest influence on your perceptions? Why?
- Do you think that the agriculture sector is effectively responding to consumer preferences in a timely and coordinated manner? Does more need to be done? In what areas? [Moderator to ensure conversation focuses on agricultural sector rather than retailers such as fast food chains]

- What do you think Canadian farmers and producers would say about the quality and safety of the foods they produce?
  - Do you believe them? Why or why not?
  - What would strengthen your trust in food production practices?
  - Probe:
    - Live streaming of farming
    - Live streaming of food processing facilities
    - Speaking directly to farmers at markets
    - Having biographical information on facility where products come from, certification/accreditation of a facility etc.

- As a consumer, do you engage in any way with farmers or food processors about their farming or processing practices? Why and in what way (e.g. Read a QR code, website, local food market, social media, farm tours etc.) or why not?
- What could help raise your level of trust in the Canadian food system? (e.g.) Would a list of companies who have been fined or suspended for food safety reasons?

Communications 10 minutes

- What would be the most effective way for government to share information with consumers/you in Canada?
- What would be your preferred method of communications? How could they best reach you?
- As a Canadian consumer, do you feel you have the opportunity to engage with governments and the food industry on the development of policies related to how food is produced and sold? Why or why not?
- Do you have any suggestions on how to do that? Probe: through government directly, through a consumer panel, through consultations sessions, online forum etc.
- What would you like to better understand about Canada's food production and who would you like to hear that from?

Wrap-up 10 minutes

[Moderator to check in the back room and probe on any additional areas of interest]

- This concludes what we needed to cover tonight.
- Is there anything that you think I should have asked but I didn't or that you would like to add?
- We really appreciate you taking the time to come down here to share your views. Your input is very important.
- Reminder to those in the first and second groups about reserving comments so as not to influence those waiting at reception for the next group.

Appendix B: Recruitment Screener

Focus Group Summary

- Recruit 10 participants per group
- Participants must be at least 18 years of age
- All must have main or joint responsibility for grocery shopping in their households (S2)
- Good mix of other demographics (age, income, etc.)

Focus Group Specifications	**Group times and Honorarium**	
Moncton Monday, June 24, 2019		Honorarium: $85
Group 1 (English)		5:00 pm
Group 2 (English)		6:30 pm
Group 3 (French)		8:00 pm
Toronto Tuesday, June 25, 2019		Honorarium: $100
Group 1		5:30 pm
Group 2		7:30 pm
Montreal Tuesday, June 25, 2019		Honorarium: $85
Group 1 (French)		5:00 pm
Group 2 (French)		6:30 pm
Group 3 (English)		8:00 pm
Winnipeg Wednesday, June 26, 2019		Honorarium: $100
Group 1		5:30 pm
Group 2		7:30 pm
Edmonton Thursday, June 27, 2019		Honorarium: $100
Group 1		5:30 pm
Group 2		7:30 pm
Respondent's name:	Interviewer:	
Respondent's phone number: (home)	Date:	
Respondent's phone number: (work)	Validated:	
Respondent's fax number:	Quality Central:	
Respondent's email:	On list:	
Sample source: panel random client referral	On quotas:	

Hello/Bonjour, my name is _______________ and I'm calling on behalf of Earnscliffe, a national public opinion research firm. We are organizing a series of discussion groups on issues of importance to Canadians, on behalf of the Government of Canada, specifically for Agriculture and Agri-Food Canada. The purpose of the study and the small group discussion is to understand perceptions and views regarding food quality and food production. We are looking for people who would be willing to participate in a discussion group that will last up to two hours. These people must be 18 years of age or older. Up to 10 participants will be taking part and for their time, participants will receive an honorarium of [if Montreal or Moncton] $85.00, [if Toronto, Winnipeg, or Edmonton] $100.00. May I continue?

Yes CONTINUE
No THANK AND TERMINATE

Would you prefer that I continue in English or French? Préférez-vous continuer en français ou en anglais? [If French, continue in French or arrange a call back with French interviewer: Nous vous rappellerons pour mener cette entrevue de recherche en français. Merci. Au revoir].

Participation is voluntary. We are interested in hearing your opinions; no attempt will be made to sell you anything or change your point of view. The format is a 'round table' discussion led by a research professional. All opinions expressed will remain anonymous and views will be grouped together to ensure no particular individual can be identified. But before we invite you to attend, we need to ask you a few questions to ensure that we get a good mix and variety of people. May I ask you a few questions? This will only take about 5 minutes.

Yes Continue
No Thank and terminate

Read to all**:** "This call may be monitored or audio taped for quality control and evaluation purposes.
Additional clarification needed:

- To ensure that I (the interviewer) am reading the questions correctly and collecting your answers accurately;
- To assess my (the interviewer) work for performance evaluation;
- To ensure that the questionnaire is accurate/correct (i.e. evaluation of CATI programming and methodology – we're asking the right questions to meet our clients' research requirements – kind of like pre-testing)
- If the call is audio taped, it is only for the purposes of playback to the interviewer for a performance evaluation immediately after the interview is conducted or it can be used by the Project Manager/client to evaluate the questionnaire if they are unavailable at the time of the interview – all audio tapes are destroyed after the evaluation.

S1. Do you or any member of your household work for…

	Yes	**No**
A marketing research firm	1	2
A magazine or newspaper, online or print	1	2
A radio or television station	1	2
A public relations company	1	2
An advertising agency or graphic design firm	1	2
An online media company or as a blog writer	1	2
The government, whether federal, provincial or municipal	1	2
The healthcare sector (READ if necessary: such as physicians, nutritionists, dietitians, etc.)	1	2
The agriculture and farming sector	1	2
Food manufacturing/food industry	1	2

If "yes" to any of the above, thank and terminate.

S2. I am going to read you three statements. Please let me know which one most accurately reflects your role in your household.

a. I have the main responsibility of grocery shopping in my household.
b. I share joint responsibility of grocery shopping in my household.
c. I do not have main or joint responsibility of grocery shopping in my household.

All participants must be a or b – preference for a's. If c, please thank and terminate.

S3. Do not ask – note gender

Male	1	Ensure good mix of gender
Female	2	

S4. Could you please tell me which of the following age categories you fall in to? Are you...

18-24 years	1	Ensure good mix of age
25-29 years	2	
30-34 years	3	
35-44 years	4	
45-54 years	5	
55-64 years	6	
65+ years	7	
Don't know/No response	9	Thank and terminate

S5. What is your current employment status?

Working full-time	1	Ensure good mix of employment status
Working part-time	2	
Self-employed	3	
Retired	4	
Unemployed	5	
Student	6	
Homemaker	7	
Other (please specify)	8	
Don't know/No response	9	Thank and terminate

S6. Which of the following categories best describes your total household income? That is, the total income of all persons in your household combined, before taxes [read list]?

Under $20,000	1	Ensure good mix of income
$20,000 to under $40,000	2	
$40,000 to under $60,000	3	
$60,000 to under $80,000	4	
$80,000 to under $100,000	5	
$100,000 to under $150,000	6	
$150,000 or more	7	
Don't know/No response	9	Thank and terminate

S7. What is the last level of education that you have completed?

Some high school only	1	Ensure good mix of education
Completed high school	2	
Some college/university	3	
Completed college/university	4	
Post-graduate studies	5	
Don't know/No response	9	Thank and terminate

S8. To make sure that we speak to a diversity of people, could you tell me what is your ethnic background? Do not read *[grid]*

Caucasian	1	Ensure good mix
Chinese	2	
South Asian (i.e., East Indian, Pakistani, etc.)	3	
Black	4	
Filipino	5	
Latin American	6	
Southeast Asian (i.e. Vietnamese, etc.)	7	
Arab	8	
West Asian (i.e. Iranian, Afghan, etc.)	9	
Korean	10	
Japanese	11	
Indigenous (First Nations, Métis, or Inuit)	12	
Other (please specify)	13	
Don't know/No response	14	

S9. Have you participated in a discussion or focus group before? A discussion group brings together a few people in order to know their opinion about a given subject.

Yes	1	(Max 1/3 per group, ask S10, S11, S12
No	2	Skip to S13
Don't know/No response	9	Thank and terminate

S10. When was the last time you attended a discussion or focus group?

If within the last 6 months	1	Thank and terminate
If not within the last 6 months	2	Continue
Don't know/No response	9	Thank and terminate

S11. How many of these sessions have you attended in the last five years?

If 4 or less	1	Continue
If 5 or more	2	Thank and terminate
Don't know/No response	9	Thank and terminate

S12. And what was/were the main topic(s) of discussion in those groups?

If related to food, food quality, food production, thank and terminate.

Invitation

S13. Participants in discussion groups are asked to voice their opinions and thoughts. How comfortable are you in voicing your opinions in front of others? Are you… (read list)

Very comfortable	1	Minimum 4 per group
Fairly comfortable	2	Continue
Comfortable	3	Continue
Not very comfortable	4	Thank and terminate
Very comfortable	5	Thank and terminate
Don't know/No response	9	Thank and terminate

S14. Sometimes participants are asked to read text, review images, or write out answers during the discussion. Is there any reason why you could not participate?

Yes	1	Thank and terminate
No	2	Continue
Don't know/No response	9	Thank and terminate

S15. Based on your responses, it looks like you have the profile we are looking for. I would like to invite you to participate in a small group discussion, called a focus group, we are conducting at [time], on [date].

As you may know, focus groups are used to gather information on a particular subject matter; in this case, the discussion will touch on food safety. The discussion will consist of 8 to 10 people and will be very informal.

[If Montreal or Moncton] It will last up to an hour and a half, refreshments will be served and you will receive $85.00 as a thank you for your time. Would you be willing to attend?

[If Toronto, Winnipeg, or Edmonton] It will last up to up to two hours, refreshments will be served and you will receive $100.00 as a thank you for your time. Would you be willing to attend?

Yes	1	Recruit
No	2	Thank and terminate
Don’t know/No response	9	Thank and terminate

Privacy Questions

Now I have a few questions that relate to privacy, your personal information and the research process. We will need your consent on a few issues that enable us to conduct our research. As I run through these questions, please feel free to ask me any questions you would like clarified.

P1) First, we will be providing the hosting facility and session moderator with a list of respondents’ names and profiles (screener responses) so that they can sign you into the group. This information will not be shared with the Government of Canada department organizing this research. Do we have your permission to do this? I assure you it will be kept strictly confidential.

Yes	1	Go to P2
No	2	Go to P1a

We need to provide the facility hosting the session and the moderator with the names and background of the people attending the focus group because only the individuals invited are allowed in the session and the facility and moderator must have this information for verification purposes. Please be assured that this information will be kept strictly confidential. Go to P1a

P1a) Now that I’ve explained this, do I have your permission to provide your name and profile to the facility?

Yes	1	Go to P2
No	2	THANK & TERMINATE

P2) An audio and/or video tape of the group session will be produced for research purposes. The tapes will be used only by the research professional to assist in preparing a report on the research findings and will be destroyed once the report is completed.

Do you agree to be audio and/or video taped for research purposes only?

Yes	1	Thank & go to P3
No	2	Read respondent info below and go to P2a

It is necessary for the research process for us to audio/video tape the session as the researcher needs this material to complete the report.

P2a) Now that I've explained this, do I have your permission for audio/video taping?

Yes	1	Thank & go to P3
No	2	Thank & terminate

P3) Employees from the Government of Canada may be onsite to observe the groups in-person from behind a one-way mirror or by video conference.

Do you agree to be observed by Government of Canada employees?

Yes	1	Thank & go to invitation
No	2	Go to P3a

P3a) It is standard qualitative procedure to invite clients, in this case, Government of Canada employees, to observe the groups in person or by video conference. They may be seated in a separate room and observe from behind a one-way mirror. They will be there simply to hear your opinions first hand although they may take their own notes and confer with the moderator on occasion to discuss whether there are any additional questions to ask the group.

Do you agree to be observed by Government of Canada employees?

Yes	1	Thank & go to invitation
No	2	Thank & terminate

Invitation:

Wonderful, you qualify to participate in one of our discussion sessions. As I mentioned earlier, the group discussion will take place [insert date and time] for up to [insert duration].

Do you have a pen handy so that I can give you the address where the group will be held? It will be held at:

Focus Group Specifications	Group times and Honorarium
Moncton Monday, June 24, 2019 Narrative Research (formerly Corporate Research Associates) 68 Highfield Street, Suite 101 Moncton, NB E1C 5N3 506-870-4277	Honorarium: $85 5:00 pm 6:30 pm 8:00 pm
Toronto Tuesday, June 25, 2019 Quality Response Inc. 2200 Yonge Street, Suite 903 Toronto, ON M4S 2C6 416-484-0072	Honorarium: $100 5:30 pm 7:30 pm
Montreal Tuesday, June 25, 2019 MBA Recherche 1470 Peel Street, Suite 800 Montreal, QC H3A 1T1 514-284-9644	Honorarium: $85 5:00 pm 6:30 pm 8:00 pm
Winnipeg Wednesday June 26, 2019 Prairie Research Associates 500 – 363 Broadway Winnipeg, MB R3C 3N9 204-987-2030	Honorarium: $100 5:30 pm 7:30 pm
Edmonton Thursday June 27, 2019 Trend Research 10011 80 Avenue NW Edmonton, AB T6E 1T4 780-485-6558	Honorarium: $100 5:30 pm 7:30 pm

We ask that you arrive fifteen minutes early to be sure you find parking, locate the facility and have time to check-in with the hosts. The hosts may be checking respondents' identification prior to the group, so please be sure to bring some personal identification with you (for example, a health card, a student card, or a driver's license). If you require glasses for reading make sure you bring them with you as well.

As we are only inviting a small number of people, your participation is very important to us. If for some reason you are unable to attend, please call us so that we may get someone to replace you. You can reach us at [insert phone number] at our office. Please ask for [name]. Someone will call you in the days leading up to the discussion to remind you.

So that we can call you to remind you about the discussion group or contact you should there be any changes, can you please confirm your name and contact information for me?

First name
Last name
email
Daytime phone number
Evening phone number

If the respondent refuses to give his/her first or last name or phone number please assure them that this information will be kept strictly confidential in accordance with the privacy law and that it is used strictly to contact them to confirm their attendance and to inform them of any changes to the discussion group. If they still refuse thank & terminate.