Agriculture and Agri-Food Canada

2019 Consumer Perceptions of Food

Qualitative Research Summary

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

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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 : recherche qualitative - sommaire.**

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

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

Catalogue Number: A22-629/2-2019E-PDF

International Standard Book Number (ISBN): 978-0-660-32355-8

Agriculture and Agri-Food Canada Number: 12981E

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