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2018-2019 Strategic Issues Focus Groups of Producers (Wave VI)

Qualitative Research Final Report Summary

Prepared for Agriculture and Agri-Food Canada

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

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Canada

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March 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 February 2019.

Cette publication est aussi disponible en français sous le titre : Groupes de discussion 2018-2019 sur les enjeux stratégiques des producteurs (Vague VI) – Résumé analytique de recherche qualitative

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Agriculture & Agri-food Canada

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EXECUTIVE SUMMARY

Earnscliffe Strategy Group (Earnscliffe) is pleased to present this report to Agriculture and Agri-Food Canada (AAFC) summarizing the results of the qualitative phase of the Strategic Issues research with food producers.

AAFC regularly conducts public opinion research with producers to track key data points over time and to provide insight on new and evolving areas of interest related to farming and agriculture. AAFC contracted Earnscliffe in 2018 to conduct the sixth wave of the department's survey of producers and the second iteration of focus groups with producers. This report outlines solely the qualitative research process and findings. The quantitative phase is presented under a separate cover.

The findings of this research will be used to monitor any changes in the public opinion environment among producers, and to gather data on a variety of new areas of interest for AAFC. More specifically, the focus groups were used to validate the findings of the quantitative survey, probe key themes that emerged from the data and seek reasons or clarification about survey responses. The total cost to conduct this research was \$244,259.77 including HST.

The research included a series of ten in-person focus groups across five locations – Chatham, ON (February 4); Charlottetown, PEI (February 6); Winkler, MB (February 6); Saint-Jérôme, QC (February 7); and, Lethbridge, AB (February 7). The audience for the groups was Canadian producers (18+) with a mix of different operation sizes, products farmed, and, gender (to the extent possible). In each location, the focus groups began at 3:00 pm and 5:30pm. The sessions were approximately two hours in length. The qualitative research also included two (2) online sessions with official language minority community (OLMC) residents (February 5). The first online session was conducted in English with producers residing in Quebec; the second with French-speaking producers residing outside Quebec. The online sessions were also two 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.

- **Producers, particularly those with larger operations, supported diversifying trade**, particularly in the current context as they perceive the United States (U.S.) market to be more volatile.
 - Producers with smaller farms felt less strongly because they tend to focus on local markets and find international trade does not affect them as much.

- **Trade agreements were acknowledged as an important and valuable aspect of growth for the sector, but participants often raised concerns about the details of the trade agreements that the Government of Canada has recently negotiated.** Many feared the potential losses from these agreements more than they looked forward to any gains.
 - This tension was evident when it came to discussion of the Canada-United States-Mexico Agreement (CUSMA). Most producers were familiar with the agreement, but opinion differed depending on the type of farm operation they own. Dairy producers were outright dissatisfied with the agreement, while others were cautiously optimistic and relieved that a deal had been struck.
 - Producers were familiar with the broad strokes of the Comprehensive Economic and Trade Agreement (CETA) and the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) but lacked specific knowledge. As with CUSMA, the few producers who felt they were more familiar with these agreements, typically dairy, hog and beef producers, felt that dairy producers had lost something.
- Many producers indicated that they were concerned with the quality of products being imported into Canada. A number spoke about their perception that imported products did not require the same level of certification as products produced in Canada, which allows foreign products to undercut domestic producers' prices.
- When asked about federal government programs and services in support of the agricultural sector, awareness was somewhat limited although a few programs were raised spontaneously in most groups: crop insurance, AgriInvest and AgriStability.
- **Most viewed government programs in general as tedious, requiring a lot of work to complete the paperwork, training, etc. without any guarantee of it paying off.**
 - Some were unhappy with how funds were allocated through different programs (particularly dairy producers).
 - Even those who successfully applied also described problems related to delays in obtaining funds, both in terms of cash flow and having the revenue count in a subsequent year when crops were performing well, resulting in adverse tax implications (this was particularly the case for AgriStability).
 - Despite the challenges they have faced, most felt that it was important for the federal government to continue to provide support to those working in the agricultural sector.
- **Very few producers volunteered the Canadian Agricultural Partnership (the Partnership),** although, there were a number of spontaneous mentions of the former programs, Growing Forward and Growing Forward 2.
 - When provided with a brief description of the Partnership, most reacted with skepticism. This was often linked to past experience with government programs (not always federal government programs) and a sense that this

was simply a political move (rebranding an existing program). Despite their skepticism, most indicated that they would look into the program.

- **There was a virtually unanimous sense that public trust in the products and practices of Canadian producers is declining and that this decline is problematic and unwarranted.** Producers argued that if the public had a better understanding about farming practices and quality of products, trust would increase.
- While most felt they wanted to personally help increase public trust, many, particularly larger operations, pointed out that they did not have much direct contact with the public or retailers.
- The general sense was that everyone, including producers, producer groups, retailers, scientists, and governments (including the Government of Canada), has a role to play in maintaining the public's trust in Canadian agriculture
- **Most producers saw themselves as stewards of the land and pointed out that it is beneficial to them to protect the environment, as their livelihood depends on its future sustainability.**
 - Many have implemented new practices and made investments in new technology to be more efficient with water and energy, to protect the soil, and to reduce waste, etc.
- Producers seemed to rely on more traditional forms of communication, namely word of mouth/peer-to-peer discussions. There was also a fairly heavy reliance (and trust) in producer groups for information that is relevant and tailored to their businesses.
 - For this reason, email newsletters seemed to be an effective way to communicate with them. A number mentioned receiving regular email updates from their producer associations, for example. That said, no one had heard of Agri-Info.
 - Few use social media, and those who do tend to be younger producers with smaller operations who have more direct public contact.

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

Signed: 

Date: March 4, 2019

Doug Anderson
Principal, Earnscliffe