Agriculture and
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2020 Buy Canadian Promotion Campaign Baseline Survey - 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:
aafc.info.aac@canada.ca

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Canada

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This public opinion research report presents the results of a survey conducted by Earnscliffe Strategy Group on behalf of Agriculture and Agri-Food Canada. The research was conducted in July and August of 2020.

Agriculture and Agri-Food Canada
1341 Baseline Road
Ottawa, ON K1A 0C5

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Summary

Earnscliffe Strategy Group (Earnscliffe) is pleased to present this report to Agriculture and Agri-Food Canada (AAFC) summarizing the results of the quantitative research that will act as a baseline measure to develop the Buy Canadian Promotion Campaign.

The 2019 Budget committed an investment of $25 million over five years for Agriculture and Agri-Food Canada (AAFC) to develop a national consumer focused campaign to better connect Canadians with and instill pride in, Canada's food system, its agriculture, food and seafood products. Also known as the Buy Canadian Promotion Campaign, the initiative was presented to the Treasury Board and included a tracking study which would monitor the effectiveness of the campaign, and to provide a better understanding of consumer preferences and reactions to the food sector.

The objectives of the research were to collect insights to be used to shape the initiative, as well as collect baseline data that would help establish benchmarks in order to track potential changes over the duration of the campaign. The contract value for this project was $74,950.19 including HST.

To meet these objectives, Earnscliffe conducted a comprehensive wave of quantitative research. The research was comprised of an online survey of 2,005 Canadians aged 18 and older who hold at least some of the household grocery buying responsibility.

The online survey was conducted using our data collection partner, Leger's, proprietary online panel. The survey was conducted from July 28, 2020 to August 3, 2020 in English and in French. The data was weighted to reflect the demographic composition of the Canadian population aged 18 and older. Because the online sample is based on those who initially self-selected for participation in the panel, no estimates of sampling error can be calculated, and the results cannot be described as statistically projectable to the target population. The treatment here of the non-probability sample is aligned with the Standards for the Conduct of Government of Canada Public Opinion Research for online surveys.

The key findings from the research are presented below.

- Most grocery shoppers (69%) indicated that they do all, or almost all, of the shopping for their households,while the other 31% of grocery shoppers do about half, or less than half.
    - The COVID-19 pandemic appears to have had little impact on roles, but it certainly has affected behaviours. The vast majority are taking precautions such as wearing a mask (82%) or using hand sanitizer (83%).

- Few indicate having any difficulty finding fresh foods, dairy products (94%), and eggs (91%) were the easiest to locate, while alcoholic beverages (66%), and fresh seafood (59%) were least (though 25% report never shopping for seafood products, and 24% said the same about alcoholic beverages). Of note, one in five (19%) shoppers found it difficult to locate pantry supplies when shopping for groceries.

- Relatedly, few grocery shoppers have any concerns about the availability of food, almost nine in ten grocery shoppers (88%) agree they were able to find most of the things they were looking for the last time they went grocery shopping.
  - Further, four in five grocery shoppers (80%) trust that they will have enough food throughout the COVID-19 pandemic.

- Nearly all (95%) rely on in-person shopping at grocery stores however, that reliance has, if anything, temporarily decreased during the pandemic. Of note, the 5% who do not rely on in-person shopping at grocery stores rely primarily on online shopping and delivery from traditional grocery stores.
  - Shoppers report relying far less on farmers' markets (from 37% down to 14%) and specialty food stores (from 30% down to 17%) and more on online options, including online shopping and delivery from traditional grocery stores.

- Looking ahead, shoppers indicate going back to relying on farmers markets (41%) at least as much as before the pandemic and while they expect their use of online options will recede somewhat post-pandemic, they appear likely to be used more in the future than had been the case in the past.
  - Prior to COVID-19, 7% relied on online shopping from traditional grocery stores, and ordering online with express pick-up. Post COVID-19, these numbers grew to 13% ordering online from traditional grocery stores, and 14% utilising online ordering with express pick-up.
  - Claimed behaviours in terms of take-out and delivery options show little fluctuation or expected change in the future.
  - Presently, a third of shoppers (33%) order take-out from fast food or dine-in restaurants at least 2-4 times per month. Food delivery services were slightly less popular with roughly one in five (22%) using services such as Uber Eats and Skip the Dishes 2-4 times per month. Finally, less than one in ten (7%) shoppers receive meal kits/food boxes at least 2-4 times per month.

- The majority of shoppers (64%) spend $300 or more on groceries every month, including a third (32%) who spend $500 or more.

- Most (64%) are not following any particular diet, but one third are and tend to primarily be doing so to be healthier or lose weight.
  - Looking more closely at specialty diets, 5% are following plant-based diets, another 14% are following meat reduced diets, and 6% are following meat based diets. A quarter of shoppers (23%) are following other diets including but not limited to low carb, calorie reduced, and gluten free.

- Shoppers tend to hold favourable impressions of Canada's agriculture and food sector, with about three in four (72%) having very positive/positive views. Nearly two-thirds (63%) feel at least somewhat knowledgeable about it.

- Just over half (54%) feel at least somewhat familiar with farming/producing and significantly fewer (41%) feel as familiar with food and beverage processing.

- There is broad consensus around the importance of (87%), as well as pride and trust in food produced in Canada (77%).

- Most (73%) are concerned about the impact COVID-19 may have on Canadian farmers and only a third (30%) are convinced the Government of Canada is doing enough to help Canadian farmers.

- Respondents are far more likely to agree than disagree that they have faith in farmers' judgement and responsible behaviour when it comes to the environment (54% vs. 8% respectively) and antibiotics (52% vs. 13% respectively).

- Nevertheless, shoppers do have concerns.
  - Just over half (56%) are more concerned about genetically modified organism (GMO) foods today than they have been in the past. However, about half (46%) feel that scientists have a clear understanding of the health effects of GMO foods – a proportion that far outstrips the proportion who hold the opposite view.
  - Opinion is divided over whether pesticides are necessary (31% agree, 30% disagree).

- There is little concern (from 8% to 26% depending on food variety) over food availability being impacted by COVID-19.
  - Half of shoppers (51%) are concerned about food affordability in Canada, and an equal portion (52%) are concerned about the level of food waste due to disruptions caused by COVID-19.

- The option that would make shoppers most proud of Canada's agricultural sector would be producing healthy food (48% selected as a top 3 source of pride) and there being affordable food grown in Canada that is available year-round (44%).

- The most common sources for information on food and agriculture are journalists (45% selected as a top three source for information) documentaries (36%) and farmers (30%). Celebrity chefs (3%), oneself (1%), and Google (1%) are among the least common.

- When shopping for food, Canadians identify price (58%), and quality (53%) of food produced in Canada (50%) as the factors that matter most.

- Shoppers have very high impressions of the quality of the food and beverages produced in Canada.
  - A third of shoppers deem the quality of food produced/grown in Canada as excellent, and another 50% say the quality is good.

- Most (64%) agree Canadian grown/produced foods are better than imported foods.
  - Though a fifth (20%) would not be willing to pay more for foods/beverages grown/produced in Canada.

- Half (52%) of shoppers often or always look for food or beverages produced in Canada.
  - The majority (61%) find it easy to identify whether a food or beverage has been produced or grown in Canada.
  - When attempting to identify country of origin, alcoholic beverages are deemed the easiest (71%), fresh seafood the most difficult (41%).
  - Most shoppers use the labels (87%) or signs (46%) to identify origin.
  - Over half of shoppers always or often look specifically for meat (58%) and produce (62%) grown in Canada.

- The majority of shoppers (61%) think "best before date" and "expiration date" mean different things.

- In an effort to reduce the amount of food wasted in Canada, over half of shoppers would place the responsibility on grocery stores (60%), and restaurants (57%).
    - Two-thirds (64%) of shoppers feel reducing food waste in their household is very important.
    - The main cause for household food waste was food going bad (58%).

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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: Stephanie Constable　　　　Date: September 29, 2020

Stephanie Constable
Principal, Earnscliffe