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2020 Research with Canada Brand Members

Final Report

Prepared for Agriculture and Agri-Food Canada

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This public opinion research report presents the results of research conducted by Environics Research Group on behalf of Agriculture and Agri-Food Canada (AAFC). The research was conducted from August 12 to October 2, 2020.

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Note: detailed banner tables are provided in a separate document

Executive summary

Background and objectives

Environics Research Group (Environics) was commissioned by Agriculture and Agri-Food Canada (AAFC) to conduct quantitative and qualitative research with members of the Canada Brand program.

AAFC launched the Canada Brand program in 2006 to provide Canadian food and beverage suppliers a way to differentiate their products in international markets. Some suppliers also use the branding domestically. Since 2014, Canada Brand has had limited program resources and offers all of its services online. Elements of Canada Brand have become dated, do not meet today's digital requirements, and need to be refreshed. Refreshing the Canada Brand imagery, messaging and promotional products will support use in international and Canadian markets. This research included a survey and follow-up in-depth interviews of current Canada Brand members. These research results will shape the development of the refresh to begin in 2020-2021. Results will provide AAFC with a better understanding of how the tools are currently being used, or reasons why they are not being used. The research results will also provide AAFC with input on desired improvements and creative resources, and feedback to better promote the campaign and increase participation in the program.

Specific objectives of the study included, but were not limited to, providing AAFC with data on:

- What aspects of the program do members like/dislike;
- Why some are no longer participating in the program and what could encourage them to use the program in the future;
- Industry member interest in updated branding and logos for the Canada Brand program;
- Suggested improvements to the current program structure; and
- How to better promote the program to attract new members.

Methodology

Quantitative phase

Environics conducted an online survey with 62 current members of the Canada Brand program, from August 12 to September 11, 2020, including producers of agricultural produce, seafood or food products (n=37), associations representing agricultural producers (n=20) and brokers/agents (n=5). An online survey was chosen so respondents could see and evaluate the current Canada Brand visuals.

AAFC provided a list of 725 Canada Brand member organizations with phone numbers and/or email addresses, after taking steps to validate contact information to the extent possible. It was anticipated that encouraging participation would be a challenge, due to various factors including: the limited size of the list, the long duration of many memberships (i.e., the original contact person may no longer be with the organization), and the difficulty of getting the attention of busy professionals in small and mid-size organizations, particularly during the COVID-19 pandemic.

Thus, a multi-pronged recruitment approach was used to maximize participation. AAFC sent out an initial email to alert members to the upcoming survey and request their participation. Next, Environics sent an email

invitation containing a link to complete the survey to members with valid email addresses. One email reminder was sent to non-respondents to the initial invitation. In some instances, members replied asking the survey be sent to a different email address; in these instances as many as two emails and two reminders were sent to a single organization (in addition to AAFC's initial email).

Telephone contact was attempted with: members with invalid email addresses (bounce backs), non-responders to the email reminder (after five business days), and members with only a phone number provided. Up to eight attempts were made to reach the members by phone. These calls were for recruitment purposes only; the only data collected/confirmed was a valid email address for the purpose of sending the survey link.

This survey is an attempted census of the Canada Brand member population. However, due to the small final sample (62 respondents) and the potential for non-response bias (i.e., the possibility the views of non-respondents differ from those who chose to respond to the survey) this study should be considered exploratory rather than projectable to the population of Canada Brand members. The results should be interpreted with caution. There is no margin of sampling error since no sample was drawn. For this reason, the results are described without reference to percentages or number of respondents.

Qualitative phase

Environics conducted 15 one-on-one interviews with survey participants who indicated they would be willing to discuss their experiences with the Canada Brand program in further detail. These interviews were conducted by Zoom videoconference between September 2 and October 2, 2020 and were approximately 30 minutes in length. The interviews included eight producers, six associations and one broker/agent.

Statement of limitations: Qualitative research provides insight into the range of opinions held within a population, rather than the weights of the opinions held, as measured in a quantitative study. The results of qualitative research should be viewed as indicative rather than projectable to the population.

Contract value

The total contract value for the research was \$61,611.39 (including HST).

Key findings

The results of this research indicate the Canada Brand members responding to the survey see value in the program. They say it provides a way for them to stand out in export and domestic markets, and to associate their products with Canadian quality.

The research also suggests many are not using the program to its full potential. The most popular elements are the maple leaf logo and the domestic content statements, which are widely used on packaging and printed promotional materials. Relatively few are currently using other program properties (e.g., tagline, ribbon, photo library, messaging on Canada's advantages).

Respondents are receptive to the idea of a brand refresh. They prioritize updating elements that support their digital marketing efforts, which have grown in importance due to the COVID-19 pandemic. They are less likely to want or need updated graphical elements for physical materials, such as packaging and trade show banners, due to the costs involved in reprinting them.

Feedback from the one-on-one interviews indicates respondents feel it is also important to improve the amount of support the program provides its members. This includes providing greater promotional support of Canada Brand to increase awareness and knowledge of its value among domestic and international customers; and engaging with members to help them leverage the program to its fullest extent.

Respondents were generally uniform across sub-groups in their assessment of the program and interest in a refresh. However, some differences were noted between producers and associations, likely due to the differences in the nature of their organizational objectives.

The key findings for each phase of the research are summarized below.

Quantitative phase

A. Joining the program

- Many survey participants are long-term members of Canada Brand, with almost half having joined before 2012, and less than half joining in 2012 or later.
- Top reasons for joining include leveraging Canada’s reputation for quality, differentiating products in the marketplace, and increased visibility.

B. Use of Canada Brand

- Of the three graphical elements currently available to members (leaf, ribbon or tagline), the Canada Brand leaf logo is the most widely used. Use of the ribbon, and tagline “Quality is in our nature/ La qualité est dans notre nature” is much less widespread.

Figure 1 : Canada Brand graphical elements



- Available graphical elements are most widely used on physical marketing materials like trade show signage, brochures and product packaging; few use them for digital marketing and social media purposes. Respondents not using these graphical elements say Canada Brand is not part of their marketing plan, they use their own graphics, or they are unaware of what is available.
- Perceptions of the leaf logo are stronger than for the tagline, which may help explain higher relative use of the logo. Respondents are more likely to agree the leaf is “eye-catching,” than to say the same about the tagline. The leaf also outshines the tagline in terms of suitability for promotional

materials and ability to convey the program's values. The tagline outscored the leaf on negative attributes, including the perception it is outdated.

- Aside from the graphical elements, the domestic content statements are the other service used most widely. Current use is considerably lower for messaging on Canada's advantages or the photo library.
- Overall satisfaction with Canada Brand is moderate, with room for improvement. A majority are at least somewhat satisfied with the program, although few are very satisfied. Respondents rate the program most highly for promoting perceptions of quality and trustworthiness. They also say the program helps them build visibility and awareness and promote their products and services. They are least likely to say the program helps them achieve their business objectives. When asked for suggestions to improve the program, respondents are as likely to mention better promotion of the program and member engagement as they are to request new and modernized graphics and images.

C. Canada Brand refresh

- There is interest in a Canada Brand refresh: a majority feel this would be useful to their organization. Respondents are most interested in market intelligence reports, followed by messaging on Canada's competitive advantages. The importance of digital marketing came through here as well, with respondents expressing interest in images and graphical elements specifically tailored for digital marketing. There is less interest in a new tagline or logo.
- There is strong interest in expanding the Canada Brand program to include domestic markets. Note that the qualitative interviews suggest some are already using the program in a domestic context.
- The COVID-19 pandemic has led many respondents to increase their digital marketing efforts. In light of the pandemic, many believe the Canada Brand is more important, or at least as important, as before.

D. Registration process

- For many, the registration process took place several years ago, so few express strong familiarity with either the process or the usage agreement. Nonetheless, most recall finding the usage agreement easy to understand, and most are generally satisfied with the process.
- Respondents generally support changes to streamline the registration process, including a fully online registration, a secure online portal and a simplified form.

Qualitative phase

The goal of the qualitative interviews was to better understand the reasons behind respondents' views and opinions expressed in the quantitative phase.

A. Program expectations and impressions

- The one-on-one interviews confirmed many joined Canada Brand to leverage perceptions of quality, safety and trust associated with Canada. Interview participants like the logo and tagline which they find: easy to incorporate into their marketing, generally fulfil their expectations for branding, and add value to their business (although not necessarily in a quantifiable way).
- The qualitative research also revealed many joined with expectations of receiving guidance and advice to leverage the program and build their business. These types of expectations are not currently being fulfilled by the program. A perception exists that Canada Brand is not as effective as it could be because it is not promoted by the federal government and, thus, consumers are not aware of what it stands for.

B. Brand refresh

- The qualitative interviews revealed the key reason why relatively few respondents want a refreshed logo and tagline (as reported in the survey findings) is due to concerns about the cost of replacing packaging and other physical marketing materials.
- Ultimately, discussions about priorities for a brand refresh focused less on the program elements and more on "process" – ways to support members beyond what currently exists.

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Political neutrality statement and contact information

I hereby certify as senior officer of Environics Research Group that the 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.



Sarah Robertson

Vice President, Corporate and Public Affairs

Introduction

Environics Research Group (Environics) was commissioned by Agriculture and Agri-Food Canada (AAFC) to conduct quantitative and qualitative research with members of the Canada Brand program.

Agriculture and Agri-Food Canada (AAFC) launched the Canada Brand program in 2006. It was designed to provide a structured brand program to help Canadian food and beverage companies and associations reinforce the sector's core attributes, and help differentiate their products as Canadian in international markets. While the program continues to provide a base for Canadian suppliers to differentiate their products in a highly-competitive global market with demanding consumers and buyers, the Canada Brand has had limited program resources and offers all of its services online.

Elements of Canada Brand have become dated, do not meet today's digital requirements, and need to be refreshed. Refreshing the Canada Brand imagery, messaging and promotional products will support use in international and Canadian markets.

Objectives

Refreshing the Canada Brand imagery, messaging and promotional products in supporting companies' use of the program internationally and in Canada. Since the reduction in program funding, the Canada Brand program has not expanded, but maintained its infrastructure and continued to approve new members. Currently, elements of the program are dated as resources to manage the program have been limited to current online resources. These research results will shape the development of the Canada Brand refresh to begin in 2020-2021. This includes providing direction with respect to the updated creative resources, messaging and/or supporting evidence on the advantages of Canada's food and agriculture sector.

This research included a survey and follow-up in-depth interviews of current Canada Brand members. Results will provide AAFC with a better understanding of how the tools are currently being used, or reasons why they are not being used. The research results will also provide AAFC with input on desired improvements and creative resources, and feedback to better promote the campaign.

The purpose of this research was to understand how the current program is being used by Canada Brand members, and to identify areas of improvement which could increase member participation in the future.

Specific objectives of the survey included, but were not limited to, providing AAFC with up-to-date data on:

- What aspects of the program do members like/dislike;
- Why some are no longer participating in the program and what could encourage them to use the program in the future;
- Industry member interest in updated branding and logos for the Canada Brand program;
- Suggested improvements to the current program structure; and
- How to better promote the program to attract new members.

About this report

This report begins with an executive summary outlining key findings and conclusions, followed by detailed analyses of both the survey and the qualitative findings. Provided under a separate cover is a detailed set of “banner tables” presenting the results for all survey questions by subgroup segments.

Use of findings of the research. By gauging and analysing the opinions of Canada Brand members, AAFC gains insights into current use of the program and its value to member organizations. The information gained through this member research will be shared throughout AAFC to assist it when establishing priorities for the refresh of Canada Brand.

Statement of limitations: Due to the small final sample of 62 respondents and the potential for non-response bias (i.e., the possibility the views of non-respondents differ from those who chose to respond to the survey), the survey results should be interpreted with caution and considered exploratory rather than projectable to the population of Canada Brand members. Qualitative research provides insight into the range of opinions held within a population, rather than the weights of the opinions held, as would be measured in a quantitative study.

Methodology

Quantitative methodology

Per the Statement of Work (SOW), the quantitative research phase consisted of a **quantitative online survey** sent to all 725 Canada Brand members with contact information (email addresses and/or phone numbers).

Target population / sampling

The qualifying population for this research was current Canada Brand members with contact information (n=725). These members are predominantly small to medium-sized enterprises (food processors) who export goods internationally; some national industry associations are also program members.

AAFC provided a sample list containing email addresses and/or phone numbers for each member's Canada Brand contact, after taking steps to validate the contact information. The survey was an attempted census of all members, and no quotas were set by region or other sub-group.

The priority for this phase of the study was to show and evaluate the current Canada Brand visuals, which required a fully online methodology (rather than a sample maximization approach involving both email and phone completions). Email invitations and up to one email reminder were sent to all valid email addresses. For non-valid emails and non-responders to the email reminder, phone calls were used to encourage an online response (i.e., a phone-to-web recruit). Since AAFC verified the contact information at the outset, additional telephone look-ups were not necessary. In total, 62 member organizations completed the survey, for a response rate of 9% (reference Appendix A for the response rate calculation).

Questionnaire and pretest

Environics, in conjunction with AAFC, designed an online questionnaire that addressed the study objectives. Environics also drafted the initial survey invitation email, ensuring it included all required information such as informing respondents of their rights under the Privacy and Access to Information Act, and the text for the reminder emails.

Environics translated the email invitation, questionnaire and reminder text into French. Test links in both languages were provided to AAFC for approval prior to launch.

Prior to fieldwork, a soft launch was conducted with a small proportion of contacts. Standard government-accepted probing questions on comprehension and appropriateness of language were asked at the end of each pretest interview, and AAFC was given the pre-test results for review prior to full launch.

Survey administration

Environics assumed overall responsibility for all aspects of the survey fieldwork. For this assignment, sampling, questionnaire programming, completing the interviews and data cleaning were subcontracted to Elemental Data Collection Inc. (EDCI) of Ottawa, a Canadian-owned field house.

The survey was conducted according to the following steps:

- Environics programmed and hosted the online survey on a secure server. All data were stored on Canadian servers and Canadian back-up servers located and only accessible in Canada, and physically independent from all other databases, directly or indirectly, that are located outside Canada.
- Invitation e-mails including a unique URL link (to ensure only one version of the survey is accepted per respondent) were sent to all members with an email address. A maximum of one reminder was sent to non-respondents to the initial invitation. In some instances, members replied with a different email address for the survey; in these instances as many as two emails and two reminders would be sent to a single organization.
- Technical support was provided to online survey respondents as required. Steps were taken to assure (and also guarantee) complete confidentiality and anonymity of survey responses.
- Phone recruitment to the online survey was attempted with: contacts with invalid email addresses (bounce backs), non-responders to the email reminder (after five business days), and contacts with only a phone number provided. We made up to eight attempts to reach the contact person. Please note the purpose of this call was for recruitment purposes only; the only data collected/confirmed was a valid email address for the purpose of sending the survey link.
- All online survey responses were electronically captured as they were submitted, and combined into an electronic data file that was coded and analyzed (including open-ended responses).

All respondents were offered the opportunity to complete the survey in their official language of choice. All research work was conducted in accordance with the Standards for the Conduct of Government of Canada Public Opinion Research for online and telephone surveys, as well as applicable federal legislation (Personal Information Protection and Electronic Documents Act, or PIPEDA). Environics is a founding member of the Canadian Research Insights Council (CRIC) and registered the survey with CRIC's Research Verification System.

Data coding and tabulation

Following data collection and prior to analysis, data analysts performed a data-cleaning and validation process, in accordance with the highest industry standards. Open-ended question data was coded and Environics designed banner tables in consultation with the project authority. Data were not weighted. Data tables were submitted in CSV format; verbatim comments were made available in an Excel document after review to ensure they do not compromise confidentiality.

Qualitative methodology

The qualitative phase of this research explored members' experiences with the Canada Brand program in greater detail. In all, 15 one-on-one interviews were conducted with survey participants who expressed interest in participating in this follow-up phase of research.

Interviews were conducted with producers (8), associations (6) and a broker/agent (1). Only two French-speaking respondents gave permission to be contacted for the follow-up interviews; despite extensive efforts, they did not respond to an interview request during the timeframe available for the research. Thus, all interviews were conducted in English.

The interviews were conducted via Zoom videoconferences between September 2 and October 2, 2020 and were approximately 30 minutes in length. Each participant was provided a \$50 cash incentive as a thank you for their time.

The following table summarizes the in-depth interviews:

Summary of interviews

Member type	Ontario	Quebec	Saskatchewan	Alberta	British Columbia	New Brunswick	Prince Edward Island	Total
Producer	0	0	2	3	2	0	1	8
Association	1	1	1	1	1	1	0	6
Broker/agent	1	0	0	0	0	0	0	1
Total	2	1	3	4	3	1	1	15

All interviews were recorded for use in subsequent analysis by the research team. During the recruitment process and at the start of their interview, participants provided consent to such recording and were given assurance of their privacy and anonymity.

I. Detailed findings – quantitative phase

A. Joining the Program

1. Program membership tenure

Many respondents are long-time Canada Brand members, with about half joining the Canada Brand program before 2012.

Respondents were asked which year their organization first joined the Canada Brand program. About half are long-time members, joining prior to 2012, while the others joined since 2012.

Associations tend to have been members for longer than producers, with most indicating a join date before 2012, compared to less than half of producers.

2. Reasons for joining

Leveraging Canada's reputation is the most important reason for joining the Canada Brand program; respondents also want to differentiate their products in the marketplace and benefit from increased visibility.

When asked to rank their top three reasons for joining Canada Brand, the top reason (i.e., most often placed in their top three) is to leverage Canada's reputation. Other common reasons for joining Canada Brand include to differentiate their product in the marketplace or increase visibility. Few respondents joined to help them achieve growth, by attracting new customers in existing markets, marketing to existing customers or accessing new markets.

Sub-groups generally note similar reasons for joining Canada Brand, however, producers are more likely than associations to say the program helps them market to their existing customer base.

B. Use of Canada Brand

1. Canada Brand graphics

Respondents use the Canada Brand leaf logo most often; the ribbon and the tagline are used less frequently.

Among the Canada Brand graphical elements available to members, the leaf graphic is by far the most widely used, with a majority of respondents having used it. There is much less use of the other elements: less than half have ever used the ribbon, while even fewer have ever used the tag line.

While use of the Canada Brand elements is mostly consistent across sub-groups, the tagline graphic is more widely used by associations (compared to producers) and by respondents based in western Canada.

2. How Canada Brand elements are used

Respondents are more likely to use a graphical element on physical marketing materials or product packaging, rather than online/digitally.

Among respondents who have used any Canada Brand graphics, most place them on marketing materials, like trade show signage and brochures. Product packaging is also a relatively popular use. There is moderate use of

Canada Brand elements on member websites and communication materials, but they are rarely used for digital marketing or on social media.

This general pattern, favouring use on physical materials over digital use, holds true across sub-groups. Producers use the Canada Brand elements most often on packaging, while associations most often use them for other marketing materials, reflecting the overall purpose of these member types.

3. Reasons for not using the Canada Brand elements

Respondents not using Canada Brand prefer their own graphics and have not built Canada Brand into their marketing plans.

Respondents who are not currently using any Canada Brand elements were asked the reasons why not (open-ended, without providing response options). The most common reason is that Canada Brand simply is not part of their marketing plan or they use their own graphics. Another common reason for not using the graphics is lack of promotion or low awareness of the program. A few say Canada Brand does not help their business or they are not exporting.

4. Perceptions of the Canada Brand elements (leaf and tagline)

Respondents widely agree the leaf is eye-catching, meets their promotional needs, and communicates Canada Brand values. Sentiment toward the Canada Brand tagline was tepid by comparison, with respondents more likely to say it is outdated and inadequate for digital marketing.

Overall impressions of the leaf are quite positive, with moderate proportions who agree it is eye-catching and attention-grabbing, meets their needs for promotional materials, and communicates the Canada Brand values. Relatively few agree with negatively worded statements that the logo is outdated and inadequate for digital and social media.

There is less enthusiasm toward the Canada Brand tagline, compared to the leaf. Few strongly agree the tagline communicates the Canada Brand values. Even fewer describe it as eye-catching or feel it meets their needs for promotional materials. However, only a few strongly agree the tagline graphic is outdated or is inadequate for social media/digital marketing. Weaker perceptions of the tagline are consistent with its lower use, noted earlier.

Sentiment toward the leaf is consistently more positive than for the tagline across sub-groups.

5. Use of other Canada Brand services

Some are currently leveraging the domestic content statements, but few are using messaging on Canada's advantages or the photo library.

Respondents were asked about their use of Canada Brand's other services (aside from the graphical elements). Domestic content statements are the most widely used of these additional services, with under half actively using them. Far fewer are using the messaging on Canada's advantages or the photo library; most have never used these.

Use of these services is generally similar across all sub-groups. Producers are more likely than associations to use the domestic content statement, likely because it is more relevant to their work.

6. Canada Brand satisfaction

Respondents are generally satisfied with the Canada Brand program.

Overall satisfaction with the program is quite high, with most respondents satisfied to some extent. Only small numbers are dissatisfied with Canada Brand or choose not to give a rating.

Sub-groups did not significantly vary in their overall satisfaction with Canada Brand.

7. Positive features of the Canada Brand program and suggestions for improvement

Respondents appreciate the clarity and brand strength of the Canada Brand graphics. They also suggest better promotion of Canada Brand, new and modernized graphics, and more member engagement could improve the program.

All respondents were asked (open-ended, without providing response options) what they like about the program, regardless of their degree of satisfaction. Respondents most like the clarity and brand recognition of the Canada Brand graphics, and the credibility conveyed by the branding.

All respondents were also asked (open-ended, without providing response options) to provide suggestions for improving the Canada Brand program. Topping the list is a desire for better promotion to increase brand recognition of the program. Some suggest a wider selection of new visuals and/or a modernized logo could enhance Canada Brand's usefulness. Others would like to see more frequent communication and information from Canada Brand.

Reasons for liking the program and suggestions for improvement were similar across all sub-groups.

8. Value of Canada Brand program

The Canada Brand program is widely seen as helpful when it comes to promoting perceptions of quality, building visibility, assisting in the promotion of products, and achieving business objectives.

Respondents were asked about the program's usefulness across four different aspects (promoting perceptions of quality, building visibility, assisting in the promotion of products, and achieving business objectives). Respondents feel the Canada Brand program has been helpful to their organizations; for each aspect, a large majority of members rated the program as "very helpful" or "somewhat helpful."

Respondents are most likely to rate Canada Brand as very helpful at promoting perceptions of high quality and trustworthiness; slightly fewer say the same about building visibility or promoting their products and services. They are least likely to rate it very helpful for achieving business objectives.

Ratings of the program's helpfulness for all four metrics is consistent across sub-groups.

C. Refresh

1. Usefulness of a Canada Brand promotional tool refresh

Respondents generally believe refreshing the program would be beneficial, especially if the refresh includes market intelligence resources, messaging on Canada's competitive advantages, and materials for use in digital marketing. There is relatively less enthusiasm for a new tagline or logo.

A majority of respondents say refreshing the Canada Brand promotional tools would be at least somewhat helpful to their organization.

In terms of the precise nature of a refresh, those who agree with the idea of a refresh are most interested in resources to enrich their own marketing efforts, especially in digital spaces. Majorities rate market intelligence reports, messaging on Canada's competitive advantages, images for social media platforms, and graphical elements for digital marketing as very useful. Interest in materials tailored for different markets and a refreshed image bank is also fairly strong. Far fewer rate a new tagline or logo as very useful; this aligns with the qualitative findings discussed later in the report, which indicate redesigning and reprinting packaging and other physical materials can be a cost barrier to members, making them less likely to use a new logo or tagline.

Respondents are generally in agreement about the usefulness of a refresh across sub-groups, with producers showing higher interest specifically in market intelligence than other subgroups. This difference may be because associations already have access to market intelligence, whereas producers may have less awareness of or access to those resources.

2. Interest in Canada Brand program being made available for use in domestic markets

Respondents would like to see the program available for domestic marketing.

Respondents express a high level of interest in using the Canada Brand program in domestic markets: a strong majority is interested to some degree, including more than half who are very interested.

While domestic use of Canada Brand held its appeal across all sub-groups, producers and organizations based in western Canada are especially interested in this idea.

3. Impact of the pandemic on digital marketing and importance of Canada Brand

In the midst of the COVID-19 pandemic, many respondents are increasing their digital marketing efforts and believe that Canada Brand is more important than ever.

The COVID-19 pandemic has had a dramatic impact on Canadian businesses and forced many of them to change the way they do business. More than half of respondents say they have increased their digital marketing efforts during the pandemic; most of the remainder are staying the course, using digital marketing at about the same level as they were before.

Along with heightened use of digital marketing, nearly half say that, in light of the impact of COVID-19 on their business, improvements to Canada Brand are more important than ever.

These findings hold true across all sub-groups.

D. Registration process

1. Familiarity with Canada Brand program registration and usage agreement

Respondents are generally familiar with the registration process and the usage agreement.

Respondents express some familiarity with both the program registration and usage agreement. A majority are at least somewhat familiar with the registration process, although few are very familiar.

Awareness of the usage agreement shows a similar pattern, with more than half being at least somewhat familiar, but only a small number being very familiar.

Among those at least marginally familiar with the usage agreement, most find it at least somewhat easy to understand; very few say it was not easy to understand.

Familiarity was generally consistent across sub-groups, though associations report greater familiarity with and understanding of the usage agreement compared to producers.

2. Satisfaction with the registration process

Respondents found the registration process satisfactory overall and are comfortable with how their information is used; however, a high rate of “don’t know” suggests some members lack familiarity with the details.

A majority of those familiar with the registration process are somewhat satisfied with it to some degree.

When asked in detail about specific aspects of the process, most respondents agree the application is easy to complete, that it is clear what will be done with their information, why that information is needed, and what will happen when they submit the registration form. Only a small proportion feel the registration form asks for too much information.

While this question was limited to those who expressed familiarity with the registration process, a notable minority were unable to describe their satisfaction with different aspects of the process (i.e., selected the “don’t know” response category).

Overall satisfaction and level of agreement with the specific statements were uniform across sub-groups.

3. Changes to the registration form and process to encourage membership

Respondents widely agree registration could be enhanced by taking it fully online with a secure and simplified process.

When asked to consider possible changes to streamline registration, most respondents say that a fully online process, a secure online portal and a simplified registration form are important elements in encouraging organizations like theirs to enrol in Canada Brand.

Sentiment toward these registration process changes was consistent across all sub-groups.

II. Detailed findings – qualitative phase

A. Program expectations and impressions

Reasons for joining. Producers typically joined the program because they wanted the Canada Brand logo on their products. Producers exporting internationally joined because they felt the brand would communicate trust, quality and safety due to Canada’s positive reputation and would help justify a higher price point versus competitors. Domestic-focused producers joined because they felt there was a strong customer base who want to support buying local, a trend they feel has further strengthened in the age of COVID. Associations joined mainly because they wanted to support Canada Brand’s ability to improve the credibility of their respective industries.

Another reason given for joining the program was the expectation that it would help them access trade shows and provide connections (e.g., trade commissioners) who can provide advice and guidance on exporting.

Registration. For small businesses, the business owner themselves joined Canada Brand. For medium to large sized businesses, it was usually a brand manager or someone in a marketing position who first suggested joining the program.

Most participants did not have a detailed recollection of the registration process, but did not recall it being a barrier to joining the program. Even if the registration seemed a bit antiquated or cumbersome, it was commented that the rigor is appreciated to ensure the “right” businesses were becoming members. At least a couple of participants voluntarily showed our interviewers the binder of Canada Brand materials they received upon joining the program.

Program descriptors. Participants were asked to describe the Canada Brand program in a couple of words. The main associations are to the branding aspect of the program (e.g., identity, reputation, image) and quality. A few described it more generally as good or effective, while a couple were more critical. Below are words or comments used to describe the program.

- **Brand/reputation:** Canadian identity; good reputation internationally; image building; recognizable, familiar; marketing advantage
- **Quality:** High quality; trusting, quality; product awareness, safe, quality, taste
- **Positives:** Good initiative; effective
- **Weaknesses:** Good concept, poorly managed; lacking

Overall impressions. Participants hold moderately positive impressions of Canada Brand, mostly feeling that their basic expectations were met. Their feedback is largely that “the potential is there, the results are not,” meaning Canada Brand quickly identifies their product as Canadian, but the support of/communication from and marketing of the program is lacking.

- Participants like the logo and tagline. They appreciate that the graphics are clear and simple, work well on packaging, and do what they set out to – show the product is Canadian. There were no voluntary (unaided) mentions about the need to update or modernize the graphics.

- There is a general perception that the program is somewhat “dormant”, in two respects. First, participants believe the Canada Brand is not as successful or effective as it could be, because the federal government does not provide promotional support (i.e., put its weight behind it). As a result, consumers do not understand what it stands for, particularly when compared to other highly visible programs [e.g., Canadian Food Inspection Agency’s (CFIA’s) Canada organic logo, or industry-specific branding such as Canada Beef]. Second, many have no interaction with the program. There is no relationship with a contact person and no regular outreach from the program, which hinders their ability to know how to make the most of the program (“yes, I have access to the logos, and that’s kind of where my experience stops.”)

B. Use and impact of Canada Brand

Use of program elements. Among participants, the Canada Brand logo/maple leaf is the most widely used element of the program, followed by the tagline. In addition, a few had used the domestic content statements. Producers use these elements on their packaging and on booths during trade shows. No producers reported using the ribbon, mostly because it was inconsistent with their branding. Associations, on the other hand, have used the logo and the ribbon on their marketing and educational materials and used them at trade shows. They are comparatively less interested in domestic content statements and other program resources.

Very few participants could remember using messaging on Canada’s advantages or the photo library. It was suggested that the photo library may be more useful for small producers and less relevant for medium to large sized businesses who can afford custom photography or to purchase web-based subscriptions to photo libraries.

Participants noted their lack of engagement with the program outside of the logo/tagline and domestic content statements is largely because they are unaware of the range of services offered, stating they “just don’t have the time” to look into what else is offered or “never thought to look into it”. Association and small businesses in particular expressed having a lack of time and resources to explore the program offerings outside of the maple leaf logo or domestic content statements which were the main drivers of their membership.

Value to their business. Participants were generally confident the Canada Brand added value to their business or association based on conversations they had had with customers. However, they had not necessarily attempted to quantify the impacts (e.g., in terms of increased sales), nor did they believe that removing the branding from their products would actively disadvantage them.

Instead, the perceived value comes in having an organization standing behind Canadian-made products and communicating quality. In international settings such as trade shows, people are attracted by the maple leaf logo which catches their eye. In the domestic context, it helps entice buyers who want to offer their customers local products.

Customer perceptions of Canada Brand. Participants report that Canada Brand is well-regarded internationally, due to Canada’s reputation for cleanliness, safety and quality. However, a few suggested that end consumers in local (domestic) markets do not have sufficient awareness and understanding of what Canada Brand means, making it difficult to justify putting the brand on their products.

The United States was also raised as a market requiring caution, due to a strong “us first” mentality where Canadian products may be perceived to have lesser value.

C. Brand refresh

When asked, participants are open to the idea of a brand refresh. In terms of what program elements to target in the refresh, participants generally agreed reinstating the market intelligence reports would be helpful if the information provided could help them better understand their markets, both domestically and internationally, and develop a competitive advantage. Interest was highest from producers, while associations are more likely to already collect industry data.

Some suggested it would be worthwhile to update the image library, with more recent photos and including the full range of industries represented by Canada Brand members; however others felt stock image agencies already fill this gap and budgets could be better spent promoting the program.

A couple of participants suggested the tag line could be “less wordy” and “include a call to action.” However, some cautioned against logo updates, and particularly anything out of step with CFIA mandates, because it is costly and time consuming to redo packaging and marketing materials.

Ultimately, participants seemed to suggest the priority for a refresh should be less on the program properties and more on the “process.” Many participants expressed a need for “some effort on Agriculture Canada’s part to help program members build awareness of what is available to them,” as well as implementing a stronger marketing campaign aimed at growing public/customer awareness of the brand.

Potential program improvements. Participant recommendations for improving the Canada Brand program fell into three main themes:

1. Better communications to, and stronger engagement with, members. This includes support with using the program (e.g. clarifying when to use domestic content statements like “made in Canada” versus “packaged in Canada”) and helping members make better use of what the program offers. Newer producer/entrepreneur in particular have less time and fewer resources to figure out how to integrate Canada Brand into their business and leverage it to its fullest potential.
2. Additional efforts on the part of AAFC and the Canada Brand program to:
 - Develop a marketing strategy and leverage technology (example: include a bar code that customers could scan to see what the label means) to build awareness of Canada Brand and its value among producers and their customers
 - Enforce proper use of the brand (e.g. ensure it is not being used inappropriately or without permission)
3. Participants also suggested services they would like to see beyond the existing elements of the Canada Brand program:
 - Support bigger, more impressive booths at trade shows, to increase the Canadian presence at trade shows relative to other countries.
 - Provide advice to members, particularly smaller business members, on how to export interprovincially before exporting internationally and providing research on domestic markets
 - Reinstate the annual meetings Canada Brand previously sponsored to provide an opportunity for building relationships and cross-pollination among members.

III. Conclusions

Based on the comments of participants in this research, the Canada Brand remains very useful to exporters, and the majority would also like a domestic market version to reinforce product origin and quality to Canadian consumers.

The research participants are not looking for changes to design elements for change's sake, given the expense involved in having to reprint packaging and marketing materials. They are interested in most kinds of resources the program may deem appropriate to create or recreate, such as market intelligence reports. The program has the potential to become more than the sum of its parts. What these participants really want is more active marketing and support from AAFC, and increased communications and advice, to ensure they are aware of what resources are available and how to best use these to their advantage.

Appendix A: Completion results

The completion results are presented in the following table.

Contact disposition – online survey

Disposition	N
Total number of sample units invited to participate	725
Invalid (undelivered)	61
Broadcasts delivered	664
Unresolved (U)	572
Did not respond	572
In-scope non-responding (IS)	30
Qualified respondent break-off	30
In-scope - responding (R)	62
Disqualified	0
Quota filled	0
Completed	62
Contact rate $[(R+IS) / (U + IS + R)]$	14%
Response rate $[R / (U + IS + R)]$	9%

Respondent profile

The following tables present the distribution of survey participants by key firmographic and other variables. Note some tables will add to over 62 respondents due to multiple mentions.

Organization type

Organization Type	Number of all respondents (n= 62)
A producer of agricultural produce, seafood or food products	37
An association supporting producers of agricultural produce, seafood or food products	20
Broker/Trader/Agent of agriculture, seafood or food products	5

Q2. Is your organization...?

Product / service type

Products / Services	Number of all respondents (n= 62)
Agricultural products or services	33
Food and beverage products or services	31
Seafood products or services	11

Q3. Please indicate the types of food or agriculture products or services for which your [company/member organizations/clients] use the Canada Brand.

Exporting status

Products / Services	Number of producers (n=42)
Currently exporting	25
Planning to export	10
Not exporting or planning to export – domestic market only	7

Q4. Are you currently exporting outside Canada, or planning to export in the near future?

Export markets

Export Markets	Percentage of producers exporting / planning to export (n=35)
United States	26
China	18
Other markets in Asia	17
Japan	12
Europe (including the UK)	11
Mexico	6
Middle East	3
Australia/New Zealand	3
India	2
Central/South America	2
Africa	1

Q5. To which markets are you [currently exporting/planning to export]?

Years in operation

Years in Operation	Number of all respondents (n= 62)
5 or fewer years	9
6 to 9 years	1
10 to 14 years	7
15 to 19 years	6
20 to 24 years	7
25 years or more	32

Q53. How long has your organization been operating in Canada?

Ownership

Ownership	Number of all respondents (n= 62)
Canadian	61
Not Canadian	1

Q54. Is the ownership of your company Canadian?

Size of operation in Canada

Employees in Canada	Number of all respondents (n= 62)
Under 10	34
10+	28

Q55. How many employees does your organization have in Canada?

Survey language

Survey Language	Number of all respondents (n= 62)
English	59
French	3

LANG. Survey language

Canadian head office location

Office Location	Number of all respondents (n= 62)
West	37
BC/Yukon	11
Alberta	9
Saskatchewan	11
Manitoba	6
East	25
Ontario	12
Quebec	7
Atlantic Canada	6

Q1. Province/territory

Appendix B: Survey questionnaire

Environics Research Group

July 30, 2020

Agriculture and Agri-Food Canada / Agriculture et Agroalimentaire Canada
Canada Brand Member Survey
Questionnaire

*Online survey conducted with member organizations (attempted census)
15-minute average length*

E-MAIL INVITATION

Subject line: **Canada Brand - Member Survey / Marque Canada - Sondage auprès des membres.**

Dear Sir/Madam,

You are invited to participate in an important online survey about refreshing the Canada Brand program to better serve Canadian food producers. The survey is being conducted by Environics Research, an independent research company, on behalf of Agriculture and Agri-Food Canada.

The survey will take about 15 minutes to complete. You will be asked about your experiences with and opinions about the Canada Brand program. The survey is voluntary and your responses will be anonymous. Your decision on whether or not to participate will not affect any dealings you may have with the Government of Canada.

If you do not have time to complete the survey in one sitting, you can return to it by clicking on the link below again. Once the survey period closes on [DATE], if you decide not to complete the entire survey, your answers will not be retained.

Please click on the following link to complete the survey:

INSERT LINK

If you have any questions about the survey, please contact Environics at Sarah.Roberton@environics.ca.

This study has been registered with the Canadian Research Insights Council's (CRIC) Research Verification Service so that you may validate its authenticity. If you would like to enquire about the details of this research, you can visit CRIC's website www.canadianresearchinsightscouncil.ca. If you choose to verify the authenticity of this research you can reference project code 20200219-EN322.

LANDING PAGE / PAGE D'ACCUEIL

Welcome and thank you for your interest in our survey / Bienvenue et merci de l'intérêt que vous portez à ce sondage.

Please select your preferred language for completing the survey / Veuillez choisissez votre langue préférée pour remplir le sondage.

01 – English / Anglais

02 – Français / French

PAGE BREAK**PUT IN BOX****About this survey****What about your personal information?**

- Your personal information will be collected, used, retained and disclosed by Environics in accordance with the applicable provincial privacy legislation or the Personal Information Protection and Electronic Documents Act (PIPEDA). Please click here to review Environics' privacy policy.
- Your survey answers will remain anonymous and will not be attributed to you or your organization in any way.

What happens after the survey?

- The final report written by Environics will be available to the public from Library and Archives Canada (<http://www.bac-lac.gc.ca/>).

< PROGRAMMING NOTE: All questions are mandatory unless otherwise indicated.>

Screening

1. In what province or territory is your organization's **Canadian** head office?

Select one only

DROP DOWN LIST – SEE QUOTAS

- 01 British Columbia
- 02 Alberta
- 03 Saskatchewan
- 04 Manitoba
- 05 Ontario
- 06 Quebec
- 07 New Brunswick
- 08 Nova Scotia
- 09 Prince Edward Island
- 10 Newfoundland and Labrador
- 11 Yukon
- 12 Northwest Territories
- 13 Nunavut

2. Is your organization...?

Select one only

- 01 A producer of agricultural produce, seafood or food products
- 02 An association supporting producers of agricultural produce, seafood or food products
- 03 Broker/Trader/Agent of agriculture, seafood or food products

3. Please indicate the types of food or agriculture products or services for which your (IF 01 AT Q2: company uses/IF 02 AT Q2: member organizations use/IF 03 AT Q2: clients use) the Canada Brand?

Select any that apply

- 01 Agricultural products or services
- 02 Food and beverage products or services
- 03 Seafood products or services

IF ASSOCIATION AT Q2 SKIP TO Q6

4. Are you currently exporting outside Canada, or planning to export in the near future?

Select one only

- 01 Currently exporting
- 02 Planning to export
- 03 Not exporting or planning to export – domestic market only

5. **IF EXPORTING OR PLANNING TO EXPORT AT Q4 ASK:** To which markets are you (**IF 01 AT Q4** : currently exporting/**IF 02 AT Q4:** planning to export?)
Select any that apply

- 01 United States
- 02 Mexico
- 03 China
- 04 Japan
- 05 Other markets in Asia
- 06 Europe (including the UK)
- 07 India
- 08 Middle East
- 09 Africa
- 10 Central/South America
- 11 Australia/New Zealand
- 12 Other

Motivation

6. To the best of your knowledge, in what year did your organization sign up for Canada Brand?

DROP DOWN LIST 2006-2019

9999 – Not sure

- 6B. **IF NOT SURE AT Q6:** Did your organization sign up for Canada Brand in:

- 01 2010 or prior
- 02 2011 to 2015
- 03 2016 or later
- 99 Not sure

7. To the best of your knowledge, what are the main reasons your organization signed up for Canada Brand?

Please rank the top three in order of importance.

DRAG AND DROP WITH THREE RANKED ITEMS.

RANDOMIZE

- 01 Help market to existing customers
- 02 Attract new customers in existing markets
- 03 Access/diversify to new markets
- 04 Differentiate products in marketplace
- 05 Increase visibility/profile
- 06 Leverage Canada's reputation for safe, high-quality foods
- 07 Supplement your own marketing resources/capacity
- 97 Other (Please specify_____)
- 99 Not sure **SINGLE PUNCH, NOT DRAG AND DROP**

7B. **IF 97 – OTHER WAS RANKED IN Q7:** What is the other main reason your organization signed up for Canada Brand?

MEDIUM-SIZED OPEN-ENDED TEXT BOX

7C. **IF LESS THAN 3 ITEMS RANKED IN Q7:** You have ranked less than 3 items. Do you still want to proceed?

01 Yes **PROCEED TO Q8**




02 No **RETURN TO Q7**

Use of Canada Brand

8. Canada Brand members have access to three graphical elements for use in marketing and communications materials, including packaging. Please indicate whether your organization is currently using, has previously used or has never used each of these graphics.

Please select one response for each graphic.

SHOW ON SEPARATE PAGES. RANDOMIZE ORDER.

Graphical element	Currently using	Used in past but not currently	Never used	Not sure
 <p>a. Canada Brand leaf</p>	01	02	03	99
 <p>b. Canada Brand tagline</p>	01	02	03	99
 <p>c. Canada Brand ribbon</p>	01	02	03	99

9. **IF ANY 01-02 AT Q8a-c ASK:** How have you used the Canada Brand graphics?

Select any that apply

- 01 On website
- 02 On product packaging
- 03 On communications materials (e.g. letterhead, emails)
- 04 On marketing materials (e.g. brochures, trade show signage)
- 05 On social media
- 06 On digital marketing
- 97 Other (Please specify _____)
- 99 Not sure **SINGLE PUNCH**

10. **IF NO 01 AT Q8a-c ASK; DO NOT ASK IF 99 FOR Q8a-c:** What is the main reason (or reasons) why your organization is not currently using the Canada Brand graphics?

MEDIUM-SIZED OPEN-ENDED TEXT BOX

[ASK ALL] Please indicate your level of agreement with the following statements about the Canada Brand leaf:

RANDOMIZE IN CAROUSEL



11. It meets your needs for the types of promotional materials you create.

12. It is eye-catching and attention-grabbing.

13. It is outdated.

14. It communicates the Canada Brand values.

15. It is not adequate for use in social media and digital marketing.

- 01 Strongly agree
- 02 Somewhat agree
- 03 Somewhat disagree
- 04 Strongly disagree
- 99 Not sure

[ASK ALL] Please indicate your level of agreement with the following statements about the Canada Brand tag line:



RANDOMIZE IN CAROUSEL

16. It meets your needs for the types of promotional materials you create.
17. It is eye-catching and attention-grabbing.
18. It is outdated.
19. It communicates the Canada Brand values.
20. It is not adequate for use in social media and digital marketing.

- 01 Strongly agree
- 02 Somewhat agree
- 03 Somewhat disagree
- 04 Strongly disagree
- 99 Not sure

The Canada Brand program also provides the following services for its members. Please indicate whether your organization is currently using, has previously used or has never used each of the following.

RANDOMIZE IN CAROUSEL

21. Photo library (high quality photos for use in marketing and promotional materials)
22. Messaging on Canada's advantages (information on linking Canada Brand attributes to messaging on your specific products or services)
23. Domestic content statement (e.g., Product of Canada, Grown in Canada, Made with 100% Canadian (ingredient name))

- 01 Currently using
- 02 Used in past but not currently
- 03 Never used
- 99 Not sure

24. Overall, how satisfied are you with the Canada Brand program?

- 01 Very satisfied
- 02 Somewhat satisfied
- 03 Not very satisfied
- 04 Not at all satisfied
- 99 Not sure

25. What, if anything, do you like about the program?

MEDIUM-SIZED OPEN-ENDED TEXT BOX

26. What recommendations, if any, would you have for improving the program, including from your experience with similar programs in other countries?

MEDIUM-SIZED OPEN-ENDED TEXT BOX

[ASK ALL] Please indicate how helpful you think the Canada Brand program has been to your organization in the following respects:

RANDOMIZE IN CAROUSEL

27. Helping you promote your products/services

28. Helping you achieve your business objectives

29. Helping you build awareness/visibility

30. Helping the perceptions of your products/services as high-quality and trusted

- 01 Very helpful
- 02 Somewhat helpful
- 03 Not very helpful
- 04 Not at all helpful
- 99 Not sure

Refresh

31. Overall, how useful would a refresh of the Canada Brand promotional tools be for your organization?

- 01 Very useful
- 02 Somewhat useful
- 03 Not very useful
- 04 Not at all useful (SKIP to Q40)
- 99 Not sure (SKIP to Q40)

How useful would each of the following changes and/or additions be for your organization?

RANDOMIZE IN CAROUSEL

32. A new logo
33. A new tagline
34. Market intelligence reports made available only to Canada Brand members
35. A refreshed image bank photo library
36. Messaging on Canada's competitive advantages
37. Materials tailored for different markets (e.g. translated materials)
38. Graphical elements tailored for digital marketing
39. Images tailored for social media platforms (e.g. Facebook, Instagram, Twitter)
 - 01 Very useful
 - 02 Somewhat useful
 - 03 Not very useful
 - 04 Not at all useful
 - 99 Not sure
40. If the Canada Brand program was made available for use in domestic markets, how interested would your organization be in using it for that purpose?
 - 01 Very interested
 - 02 Somewhat interested
 - 03 Not very interested
 - 04 Not at all interested
 - 98 Not applicable
 - 99 Not sure
- N1. Have your organization's digital or online marketing efforts changed since the COVID-19 pandemic?
 - 01 Increased
 - 02 Stayed about the same
 - 03 Decreased
 - 04 Do not do any digital marketing
 - 99 Not sure
- N2. Thinking about the impact of the COVID-19 pandemic on your organization, are improvements to the digital elements of the Canada Brand program (e.g., refreshed graphics, updated images for social media) more or less important to your marketing efforts than before, or equally as important as before?
 - 01 More important than before
 - 02 Equally as important as before
 - 03 Less important than before
 - 99 Not sure

Registration process

How familiar are you with each of the following:

41. The Canada Brand registration process

42. The Canada Brand usage agreement

- 01 Very familiar
- 02 Somewhat familiar
- 03 Not very familiar
- 04 Not at all familiar

43. **ASK IF VERY, SOMEWHAT OR NOT VERY FAMILIAR WITH USAGE AGREEMENT IN Q41**

How easy is the Canada Brand usage agreement to understand?

- 01 Very easy
- 02 Somewhat easy
- 03 Not very easy
- 04 Not at all easy
- 99 Not sure

44. **ASK IF VERY, SOMEWHAT OR NOT VERY FAMILIAR WITH REGISTRATION PROCESS IN Q41**

Overall, how would you rate your organization's satisfaction with the Canada Brands registration process?

- 01 Very satisfied
- 02 Somewhat satisfied
- 03 Not very satisfied
- 04 Not at all satisfied
- 99 Not sure

ASK Q44-48 IF VERY, SOMEWHAT OR NOT VERY FAMILIAR WITH REGISTRATION PROCESS IN Q41

Please indicate your level of agreement with the following statements about the Canada Brand registration form and process:

RANDOMIZE IN CAROUSEL

45. The application form is easy to complete

46. Too much information was required

47. It was clear why the requested information was needed

48. It was clear what would be done with the information

49. It was clear what would happen next once you submitted the form

- 01 Strongly agree
- 02 Somewhat agree
- 03 Somewhat disagree
- 04 Strongly disagree
- 99 Not sure

ASK ALL

How important do you think the following changes to the registration process would be in encouraging organizations like yours to enrol?

- 50. A fully online registration process
 - 51. A simplified application form
 - 52. A secure online portal for completing a thorough company profile
- 01 Very important
 - 02 Somewhat important
 - 03 Not very important
 - 04 Not at all important
 - 99 Not sure

Firmographics

The following are a few questions about your organization, for statistical purposes only. Please be assured that your answers will remain completely anonymous.

- 53. How long has your organization been operating in Canada?

- 01 5 or fewer years
- 02 6 to 9 years
- 03 10 to 14 years
- 04 15 to 19 years
- 05 20 to 24 years
- 06 25 years or more
- 99 Not sure

- 54. Is the ownership of your company Canadian?

- 01 Yes
- 02 No

- 55. How many employees does your organization have in Canada?

RECORD Number

- 56. We will be conducting follow-up telephone interviews with organizations like yours, to discuss the topics covered in this survey in greater depth. Would you be willing to participate in a brief 30-minute telephone interview with an Environics researcher in the coming weeks? We are offering interview participants \$50 as a thank you for their time and input.

- 01 Yes, I am willing to be contacted
- 02 No, I do not wish to be contacted

IF YES, Please Confirm:

FIRST NAME: _____

LAST NAME: _____

EMAIL ADDRESS _____

DAYTIME PHONE NUMBER (Enter 10 digits only, with no other characters) _____

SHOW ALL: This completes the survey. On behalf of Agriculture and Agri-Food Canada, thank you for your valuable input. In the coming months, the results of this survey will be available on the Library and Archives Canada website.

LANDING END PAGE LINK TO

ENGLISH: <https://marquecanadabrand.agr.gc.ca/intro/index-eng.html>

FRENCH: <https://marquecanadabrand.agr.gc.ca/intro/index-fra.html>

Appendix C: In-depth interview discussion guide

Environics Research Group

February 5, 2020

Agriculture and Agri-Food Canada / Agriculture et Agroalimentaire Canada
Canada Brand Member In Depth Interview (IDI)
Discussion Guide

15-20 one-on-one qualitative telephone interviews conducted with small subset of member organizations who participated in the survey (30-minute average length)

Name & Title: _____
Organization: _____
Date: _____
Interviewer: _____
Interview number: _____

Introduction

Hello, my name is _____ from Environics, and I am calling to conduct our scheduled interview.

As you know, we are conducting interviews with organizations like yours about the Canada Brand program. We would like you to share your thoughts and experiences.

The interview will take approximately 30 minutes to complete, depending on your responses.

Your responses will not be linked to your name or organization.

Do you have any questions before we begin?

Overall impressions

1. When you think of the Canada Brand program, what ONE OR TWO words would you use to describe it?
2. In general terms, do you have a positive or negative impression of the Canada Brand program?

Why do you say that?

3. When did your organization first become a member, and how did that come about? That is, why did you choose to become a member?

PROBE: Do you recall what your expectations were for the program? What were you hoping the program could help you achieve?

4. To what extent has the program met or not met your expectations?

Use

5. What aspects of the program have you found most valuable? Why/how is it valuable?

Logo

Tagline

Ribbon

Photo library

Messaging on Canada's advantages

Domestic content statements

6. Have you used any other aspects of the program?

For those used: How do you think using this aspect helped you?

For those not used: Why not?

7. What impact, if any, has Canada Brand had on your business?

What advantages or opportunities has it provided?

Are there any drawbacks or disadvantages?

8. In your view, how is the Canada Brand perceived by your customers in export markets?

9. Early on in the program, members had access to market intelligence reports that were not made publicly available elsewhere. This was eventually discontinued. How interested would your organization be to have member-only market intelligence reports? Would this be valuable to you? Why or why not?

Potential Brand refresh

10. Thinking about the Canada Brand refresh, what do you feel should be the main priorities? What is going to make the most difference/provide the most value for your organization?
11. Do you have ideas/suggestions based on what you've seen from similar programs in other countries?
12. What concerns, if any, do you have about the Canada Brand refresh?

PROBE: Is there anything that should be avoided?

Registration

13. Are you familiar with or do you recall the registration process?

IF YES: What were your impressions of the registration process?

What did you like? What did you dislike?

How could it be improved?
14. Is there anything else you would like to add? Was there anything you expected might be covered in this interview that was not?

On behalf of Agriculture and Agri-Food Canada, thank you very much for taking the time to speak to me.

CONFIRM NAME AND MAILING ADDRESS FOR INCENTIVE