



2020 Research with Canada Brand Members

Executive summary

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.

Cette publication est aussi disponible en français sous le titre *Étude 2020 auprès des membres de la marque Canada - Sommaire*.

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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.



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