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2022 Qualitative Research on Consumer and Producer Views Towards Sustainability in Agriculture

Executive Summary

Prepared for Agriculture and Agri-Food Canada

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Canada

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This public opinion research report presents the results of focus groups and in-depth interviews conducted by Earnscliffe Strategy Group on behalf of Agriculture and Agri-Food Canada. The research was conducted in February and March 2022.

Cette publication est aussi disponible en français sous le titre : Recherche qualitative sur les points de vue des consommateurs et des producteurs sur la durabilité en agriculture - 2022

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Executive summary

Earnscliffe Strategy Group (Earnscliffe) is pleased to present this report to Agriculture and Agri-Food Canada (AAFC) summarizing the results of the qualitative research undertaken to understand consumer and producer views towards sustainability in agriculture.

Budget 2019 committed $25 million over five years under the Food Policy for AAFC to “make Canadian food the top choice at home and abroad”, under what is now known as the AgriCommunication Initiative. The objective of this initiative is to increase appreciation and pride in the contribution of farmers and the food industry and enhance public trust between Canadians and farmers.

Previous public opinion research (POR) conducted by Earnscliffe in 2020 (Buy Canadian Promotional Campaign Baseline Survey) and 2021 (Canadian Agri-Awareness Initiative Focus Groups) suggests there may be a disconnect in perceptions between the agricultural sector and Canadian consumers who are not exposed to agricultural practices.

The objective of this research is to understand perceptions of consumers and producers on environmental sustainability in the agriculture and food sector in Canada. This involved exploring changing consumer preferences and expectations around agricultural sustainability, including the unique challenges facing consumers from northern and remote communities. It also involved exploring producer perspectives and efforts toward sustainability and environmental stewardship. The results from this research will be used to inform the direction of the AgriCommunication Initiative as well as future program and policy development. The total contract value for this research was $193,795.17 including taxes.

To meet the research objectives, Earnscliffe conducted a series of 24 online discussion groups with consumers (12) and producers (12), and twenty (20) in-depth interviews with consumers living in northern, remote communities. Consumers were defined as Canadian adults (18+) who have joint/sole responsibility for grocery shopping in their households. Producers were defined as farmers or ranchers with at least $10,000 in annual farming sales. Five regions of the country were studied: British Columbia, Prairies (Alberta, Saskatchewan, Manitoba), Ontario, Quebec (in French), and Atlantic (Newfoundland and Labrador, New Brunswick, Nova Scotia, Prince Edward Island).

Within each region, one group was conducted with youth consumers (participants 18 to 34 years of age), one group with adult consumers (participants 35 years of age and older), and two groups with producers. Additional discussion groups were held with those residing in official language minority communities (OLMCs): French speakers residing outside of Quebec and English speakers residing in Quebec, for each consumer and producer audience. The interviews were conducted with a mix of youth and adult consumers (as defined above) living in one of the 121 northern, remote communities supported by Nutrition North Canada. The focus groups were conducted online between February 22 and 25, 2022 and the in-depth interviews were conducted between February 14 and March 16, 2022. The groups took on average 90 minutes and the interviews were 30 to 40 minutes in length.

Qualitative research disclaimer

It is important to note that qualitative research is a form of scientific, social, policy, and public opinion research. Focus group research is not designed to help a group reach a consensus or to make decisions, but rather to elicit the full range of ideas, attitudes, experiences, and opinions of a selected sample of participants on a defined topic. Because of the small numbers involved, the participants cannot be expected to be thoroughly representative in a statistical sense of the larger population from which they are drawn, and findings cannot reliably be generalized beyond their number. As such, results are directional only.

The key findings of this research are presented below.

Key findings

Views toward Canada's agriculture and food sector

- Consumers' reflections on Canada's agriculture and food sector were generally positive and included images of varied farmlands, as well as the concept of local, farmers and farmers' markets. More critical images tended to focus on rising food prices.

- Consumers' familiarity with Canada's agriculture and food sector varied widely. Many consumers from northern or remote communities struggled to conjure up any real images or thoughts about Canada's agricultural and food sector, while some participants in the focus groups had personal experiences on farms. Most, however, admitted that Canada's agricultural and food sector was not something they thought about often.

- Producers tended to mention the positive aspects of their work when they reflected on Canada's agricultural and food sector, although their unaided reflections included some challenges. They often cited the vast and varied crops produced by Canadian producers and the diversity in terms of farming practices and the important role producers perform in food production and feeding Canadians. Negative images were also offered, however, including the sense that the sector is not a priority, in danger, challenged in a variety of ways beyond their control (such as, changing weather patterns, government policy and regulation) and offers meagre earnings.

- For both consumers and producers, the term sustainable agriculture tended to be defined in terms of longevity (for example, regeneration, renewability, replenishment, consistency), although for some it meant or included an environmental aspect.

- For consumers, the concept of sustainability seemed to correlate readily with environmental stewardship. The correlation with social responsibility (in terms of the availability of food for generations to come) was evident but less pronounced. Very few, if any, perceived a correlation with economic profitability. Worth noting is that while consumers recognized the correlation between sustainability and environmental stewardship, many expressed that the terms were not interchangeable. They explained that sustainability implied something long term. The concept also raised the issue of economic profitability, the importance of which was more pronounced among producers than consumers.

- When asked how important environmentally sustainable agriculture is to them personally, whether a consumer or producer, nearly all deemed it important to some degree (with most saying very important).
  - For consumers, it is important to have an abundance of healthy, local, foods to eat over the long term.
  - For producers, environmentally sustainable agriculture was inextricably tied to their own long-term economic prospects and therefore, a fundamental characteristic of their work. They also often spoke of a need to stay up to date with respect to technological advances in farming practices, production, relying on contemporary research and development, avoiding over-production (or under-production), and reducing inputs.
- Interestingly, for producers, this question often elicited conversation around the challenges they face to be more sustainable. These include pressures from consumers to be more sustainable in their practices, with a market that does not take sustainability into account, and the lack of sustainability in other parts of the agriculture sector in Canada. They argued that these issues are not just at the production level, but producers are continually held accountable.

Environmentally sustainable agriculture practices

- By and large, both target audiences felt most producers in Canada at least try to be environmentally responsible. Consumers often explicitly distinguished between smaller, family-owned operations, and factory or mega farms, indicating they had more favourable impressions of the environmental sustainability of the former than the latter. Within producer groups, some acknowledged there are “some” producers who unfortunately, do not always operate using environmentally sustainable practices.
- Producer recognition of the term beneficial management practices was limited to non-existent, though once provided with examples, producers had little difficulty naming specific practices they employ to be more environmentally sustainable. In fact, most seemed to be employing a variety of these practices as a matter of course (such as, crop rotation, continual cover, reduced tillage, innovative drainage, compaction prevention/reduction, rotational grazing). Interestingly, they did not think of these practices as environmentally sustainable practices so much as the way they farm. Indeed, these practices are already deeply engrained in their operations. They do these things because it is better for the sustainability (environmental, social, and financial) of their business.

- Conversely, the vast majority of consumers had a difficult time naming (unaided) farming practices that are better for the environment/environmentally sustainable.

- When presented with a list of five environmental farming practices, reactions were mostly positive, and the vast majority indicated that knowing these practices were being implemented increased their trust in producers.

- Producers were open to implementing more sustainable practices, particularly if a few important barriers were removed, namely cost, labour and time. More information on the effectiveness of a specific approach would be helpful in making the transition.

Consumer preferences and shopping behaviours

- When asked what criteria consumers consider when making purchase decisions, they cited price/being on sale; the appearance and perceived quality of the product; and the ingredients and healthy features. Where the product originated from was also mentioned, although this appeared to be for certain foods and sometimes at certain times (seasonal) or places (farmers' markets). Price was a common concern for consumers, and many complained about the rising cost of food.

- Buying local (meaning the food was grown or produced nearby) also seemed to be very important to many consumers, especially for produce. "Locally produced" seemed to imply environmental and sustainably produced food. For many, "locally produced" implies the items did not travel as far to get to market, which is better for the environment.

- Although several consumers indicated they look for sustainably produced food, most expressed difficulty identifying sustainably produced food when grocery shopping.

  - Most tended to look for organic (meaning natural/grown without chemicals) more than any other certification or claim; though, when prompted, others mentioned having seen non-GMO, free-range, grass-fed, or natural on products before.

  - Consumers in northern or remote communities appeared to have less of an ability to be selective based on environmental responsibility, given the very narrow range of options.

- Consumers seemed to be torn as to the credibility of certifications or claims of sustainability on food products and wished there was a way to know for sure. Some assumed products with these claims likely had to pass some test of credibility; while others seemed to think marketers can say just about anything with very little retribution.

- Producers also held conflicting views. Some used these certifications to market their farming practices while others seemed to think these claims were marketing tools rather than evidence of sound practices.

- Consumers were asked if they would be willing to pay higher prices, have less variety of foods, or sacrifice convenience to support environmental sustainability in food. Some said they are more willing to sacrifice for environmentally sustainable foods than others, though many were resistant to paying more.

  - Producers suggested that although there is interest in organic foods, most consumers are not willing to pay the higher prices they necessitate or buy the imperfect looking products. Some also shared their view that organic is not well understood by consumers and that employing the practice required to be “officially” organic does not result in a product that is noticeably healthier or more sustainable.
  - Some producers also suggested that although many consumers say they want more options (like organic or more sustainable options), they ultimately choose the cheapest option. For some producers, this was a source of added frustration, because the producers want to provide the products consumer claim they want to buy, but the sense was that too often, consumers do not follow through with the act of paying the necessary premium, or accept the imperfections, to purchase food produced in the most environmentally sustainable ways.

- With respect to having less variety, some consumers would be prepared, and do currently, try to eat in season. It seems youth consumers are also more likely to accept less variety than adult consumers in order to support sustainability in agriculture. The majority would sacrifice convenience, particularly by reducing packaging and processing.

Environmental actions

- Most consumers indicated they are taking actions to reduce their environmental impact such as: using reusable shopping and produce bags for some, choosing products with less packaging, reducing food waste, buying local, growing a personal garden and composting. In some groups, a few participants said they had made dietary changes for environmental reasons.
  - Overall, youth consumers seem more likely to note specific environmental and humanitarian actions they take or changes they have made, including making changes to their diet and food sharing (with friends and strangers) to limit food waste and save money.
  - Similarly, producers also seemed to be trying to find ways to reduce their packaging though they have been either limited by the cost or the adverse impact on the quality or appearance of the packaging on their product.

- Consumers defined food waste as throwing out food that has gone bad or is unwanted. There was also near consensus that food waste is a problem in Canada, but there was more debate over who is most responsible for that waste. The vast majority felt consumers were responsible for food waste, however, several also criticized grocery stores and restaurants.
  - Producers agreed with consumers that there is a food waste problem in Canada. Producers felt food waste was attributable to consumers unwilling to buy anything but the

most perfect looking produce, grocery stores who discard meat or dairy past the date of expiration, or restaurants who refuse to use food products based on appearance.

- To reduce food waste, and specifically to avoid wasting money, consumers eat leftovers; freeze foods to be used later; do not rely solely on the expiry or best before dates listed on food; compost; and, do not buy as much food in bulk.

Communications and advocacy

- Consumers were cognizant of their lack of awareness of agriculture practices, though many said explicitly that they were interested in knowing more. Topics of interest include: the processes and practices producers use; whether producers felt the industry was environmentally sustainable; the economics of farming; and, what motivates producers.

- There was consensus among producers that consumers were misinformed about the agriculture industry and its processes. They do not have the time or resources to educate the public but enjoy speaking with and educating their customers.

    - Many producers feel education needs to be in schools, while others felt it was producer groups who should be responsible for it. Only a few producers felt the Government of Canada should play a role in educating the public. Producers hope for a more consistent application of regulations from the government.

- In terms of advocacy, producers expressed the need to challenge the spread of misinformation by media or documentaries. Producers also want consumers to be better informed about the buzzwords used by marketers.

Research Firm:

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

Signed: Date: March 11, 2022

Stephanie Constable
Principal, Earnscliffe