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2022-23 Qualitative Research on Consumer Perceptions of Sustainability-Oriented Food Assurance Systems

Executive summary

Prepared for Agriculture and Agri-Food Canada

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For more information on this report, please contact Agriculture and Agri-Food Canada at:
aaafc.info.aac@agr.gc.ca

Ce rapport est aussi disponible en français.

Canada

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March 2023

This public opinion research report presents the results of focus groups conducted by Earnscliffe Strategy Group on behalf of Agriculture and Agri-Food Canada. The fieldwork for the qualitative research was conducted in January 2023.

Cette publication est aussi disponible en français sous le titre : *Recherche qualitative sur les perceptions des consommateurs à l'égard des systèmes d'assurance alimentaire axés sur la durabilité, 2022-2023.*

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Agriculture and Agri-Food Canada
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Executive summary

Earnscliffe Strategy Group (Earnscliffe) is pleased to present this report to Agriculture and Agri-Food Canada (AAFC) summarizing the results of qualitative research undertaken to understand consumer drivers of use of and expectations around sustainability-oriented food assurance systems.

Budget 2019 committed an investment of \$25 million over five years for Agriculture and Agri-food Canada (AAFC) to develop a national approach to better connect Canadians with and instill pride in Canada's food system and the agriculture sector. The AgriCommunication Initiative (ACI) objective is to increase appreciation and pride in the contribution of farmers and the food industry and enhance public trust between Canadians and farmers.

As a result, AAFC wanted to better understand consumers' current and future use and perception of assurance systems and labels. Assurance systems refer to the processes and procedures that provide confidence and trust that associated risks along the food supply chain are adequately addressed and claims can be proven. For instance, that the food is safe, and meets market requirements. AAFC works with the sector to ensure that systems, standards, and tools, including assurance labels which signify a comprehensive assurance system behind it, are developed to support its ability to prevent and control risks and address market demands.

At this time, AAFC wanted to conduct qualitative research to build on the quantitative research they did investigating awareness of assurance labels. The primary objective of this research was to explore the role of and understanding of assurance labels, key drivers, and barriers, as well as needs and perceptions of sustainability-oriented assurance systems and labels. The contract value for this project was \$74,994.71 including HST.

To meet these objectives, Earnscliffe was retained to conduct a series of twelve (12) focus groups between January 23 and 25, 2023. The audience for the research was adults aged 18 and older who have joint/sole responsibility for grocery shopping in their household. Five (5) regions of the country were studied: British Columbia/Territories (British Columbia, Yukon, Northwest Territories and Nunavut), Prairies (Alberta, Saskatchewan, and Manitoba), Ontario, Quebec (in French), and Atlantic Canada (New Brunswick, Nova Scotia, Prince Edward Island and Newfoundland and Labrador). Two groups were conducted in each region, segregated by age: "young adults," 18 to 34 years of age and "adults," 35 years or older. In addition, two groups were conducted with adult consumers identifying as Black, Indigenous, or other Person of Colour (BIPOC) – one in English (with participants from across the country) and one in French (with participants from across Ontario and Quebec).

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.

- When consumers think of Canada’s agriculture and food sector, the first things that comes to mind tended to be positive images of varied farmlands and products (for example, grains, meat, dairy, fruits or berries, and vegetables). The concept of local and farmers or farmers markets also came up, as did, rising food prices.
- When asked to rate their level of trust in Canada’s agriculture and the agri-food sector using a 10-point scale, the majority (54 of 81 participants) indicated they were generally trusting (rating of 7 to 10).
- When asked what sustainable means as it relates to agriculture and the agri-food sector, consumers tended to be somewhat divided between supply-related responses (availability, consistency, reliability) and environmental-related responses (growing methods, emissions due to transportation, stewardship of the land).
- When asked if they believe that food produced in Canada is produced in an environmentally sustainable manner, most felt that they did not know, but many indicated that they assumed it was, particularly as they did not hear much (in the news/media) to the contrary. For those who had doubts, they tended to revolve around skepticism around use of GMOs and pesticides, particularly among larger producers, and concerns around food scarcity and food waste.
- While not all participants were sure how sustainability related to their own purchases or behaviours, when asked how they can tell whether a food/product is environmentally sustainable, the most common mention was buying locally produced food, either at their grocery store or farmers’ market. Also commonly mentioned was choosing products that have less, or more recyclable or biodegradable packaging.
- When asked if they seek out food that is produced in an environmentally sustainable way some participants in each group said that they did, though not the majority.
 - Of those, a few noted that they use the labeling provided to identify sustainably produced food, however, others assessed sustainability by way of the packaging or the product’s origin. Participants explained they preferred products that come from somewhere closer to home (and therefore do not have to travel as far which is more environmentally responsible) but, at minimum, produced within Canada.
- Unaided recall of assurance labels was limited. While some in every group mentioned seeing labels with claims about such things as organic, non-GMO, free-range, or fish caught in a sustainable (or responsible) manner, every group had as many or more that were unable to recall such things voluntarily.
- Credibility of existing assurance labels varied widely among participants and by type of claim. Trust in them was described as being related to the level of experience and information people felt they had about them.

- Trust aside, roughly half of participants felt that assurance labels were helpful to widely varying degrees. A few participants felt strongly in favour of assurance labels, while others described them as “better than nothing.”
- In terms of the impact these assurance labels have on purchase intention, few were willing to say they have had much impact on behaviour, often saying price outweighs such claims as a factor influencing purchase.
- For assurance labels to be impactful, participants indicated a need to know what the label represents and how it is validated.
- To understand participants’ views related to a common assurance label, participants were shown examples of an assurance system and label used in the United Kingdom (UK) known as Red Tractor. Information was provided that explained that this assurance system and label was created by the agriculture industry to help consumers to easily identify the assurance label and know the standards (in other words, food safety, environmental sustainability, animal welfare, fair treatment of people/employees) behind it.
- Reactions to the Red Tractor assurance system and label were broadly positive. Participants appreciated the notion of a single assurance label, that identified products that met certain standards, that producers of different product types were involved in establishing the standards for their products, and that there were additional certifications for specific products (such as, free range).
- The fact that the Red Tractor assurance system was industry-led and managed was met with mixed reactions and skepticism by some. The oversight of an assurance system was cited as a key element to instilling long-term confidence in, and value of, said system.
 - Preference of oversight seemed to lean toward a consortium of partners including industry, farmers, consumers, scientists, and government officials.
 - The desired role for government was around subsidization (particularly of small producers), public awareness/education, regulation, oversight, inspection, and enforcement.
- If it were to work as intended and hoped, most clearly indicated that it would be beneficial to have a common assurance system and label like this in Canada. Several suggested that it may influence some purchase behaviours; and a few felt there would be intrinsic value in purchasing multiple products bearing a common assurance label.
- If a common assurance system and label were implemented, participants would most like to know the sustainability practices required to achieve accreditation. Discussions suggested that participants would do their own research to make sure that trusted partners endorsed the standards and how they were being applied or verified.
- In terms of where consumers would go for information, point-of-sale signage, website, or traditional public awareness campaign educating interested consumers on the standards

would be helpful. Where point-of-sale signage was concerned, QR codes were raised – sometimes voluntarily – as a method for triggering this learning, although there were mixed views about whether that would be sufficient (especially for “older” consumers).

Research firm: Earnscliffe Strategy Group (Earnscliffe)

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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: February 10, 2023

A handwritten signature in black ink, appearing to read 'Stephanie Constable', written in a cursive style.

Stephanie Constable
Principal, Earnscliffe